

A graduation cap is positioned at the top left, and a stack of books with a rolled-up diploma tied with a red ribbon and a tassel is at the bottom left. The background is a solid teal color.

# ANNUAL EMPLOYER TRAINING

Higher Education

March 19, 2025

# Agenda

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





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- What is EMIS
- Getting started
- Navigating EMIS
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- Establishing new directory contacts (for new agencies)
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Employer Directory Contacts (Form 1EDC)



Employers provide information necessary for TRSL to establish and maintain accurate membership accounts. Each TRSL reporting agency must authorize employer personnel who will report, correct, and certify employee data, either by paper forms or through the Employer/Membership Information Site (EMIS) via the [Authorized Contacts](#) (Form 1). Additionally, employers can identify personnel who will serve as information contacts via the [Employer Directory Contacts](#) (Form 1EDC).

Authorized Contacts (Form 1)

This explains details how to designate personnel responsible for certifying data on TRSL documents and accessing/certifying data on EMIS. These personnel must be authorized by their Superintendent/Agency Head or Agency Head Designee on the [Authorized Contacts](#) (Form 1).

What is an authorized signer?

Employer personnel designated as authorized signers are responsible for reporting, correcting or certifying employer data to TRSL either via the EMIS or via paper forms. Authorized signers have the authority to sign TRSL forms requiring certification from the reporting agency, such as refund applications, Form 11B agency certifications, and service credit certifications that require certification of the employer. Authorized signers must include their signature and the signature of the designated person in the signature fields on Form 1. Authorized signers cannot certify their own personal retirement records; only authorized signers can certify their own records.

the designated personnel's signature if Inquiry only access is needed for additional employer staff. Employer personnel who are given Inquiry only access do not have to be designated as authorized signers.

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

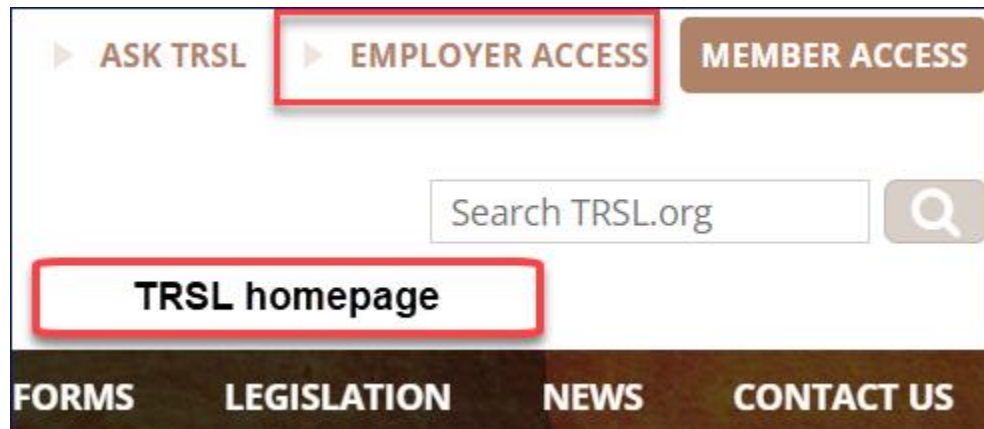
Provides an overview of TRSL's employer access database and how to obtain employer access to EMIS

# 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 11B)		
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		



# Reports available in EMIS

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

## Various report options include:

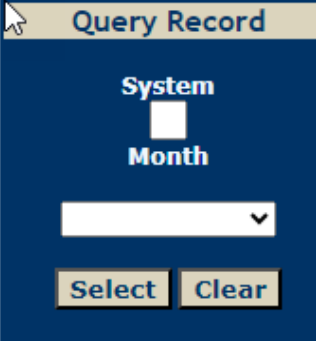
- Enrolled Not Reported
- Reporting Not Enrolled
- Ending DROP Participation
- Members Eligible to Retire
- ORP to TRSL Election Eligibility

Report	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	

# 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

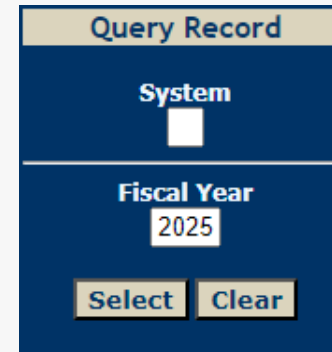


The image shows a screenshot of a software window titled "Query Record". The window has a dark blue background. At the top, there is a label "System" above a small white square. Below that is a label "Month" above a white dropdown menu with a downward arrow. At the bottom of the window, there are two buttons: "Select" and "Clear".

# 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

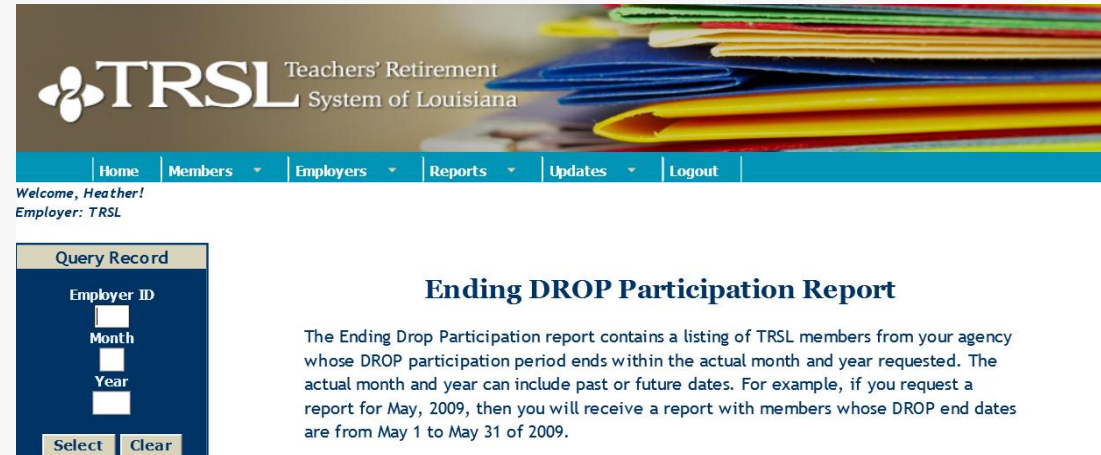


The image shows a screenshot of a web application interface titled "Query Record". It features a dark blue background with white text. At the top, the title "Query Record" is displayed in a light blue box. Below the title, there are two input fields. The first field is labeled "System" and contains a white square. The second field is labeled "Fiscal Year" and contains the number "2025". At the bottom of the form, there are two buttons: "Select" and "Clear", both with white text on a dark blue background.

# 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.

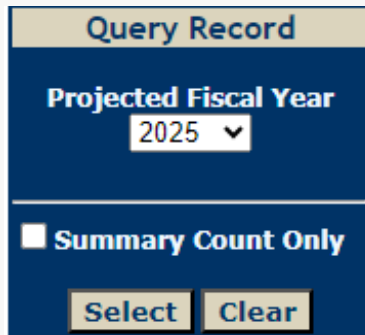


The screenshot displays the TRSL website interface. At the top, the TRSL logo and name are visible. Below the logo is a navigation menu with links for Home, Members, Employers, Reports, Updates, and Logout. A welcome message reads "Welcome, Heather! Employer: TRSL". The main content area features a "Query Record" form with input fields for Employer ID, Month, and Year, and buttons for Select and Clear. To the right of the form, the title "Ending DROP Participation Report" is displayed, followed by a descriptive paragraph: "The Ending Drop Participation report contains a listing of TRSL members from your agency whose DROP participation period ends within the actual month and year requested. The actual month and year can include past or future dates. For example, if you request a report for May, 2009, then you will receive a report with members whose DROP end dates are from May 1 to May 31 of 2009."

# 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.



The screenshot shows a dark blue interface with a light blue header. The header contains the text 'Query Record'. Below the header, there is a section for 'Projected Fiscal Year' with a dropdown menu showing '2025'. Below this, there is a checkbox labeled 'Summary Count Only' which is currently unchecked. At the bottom of the interface, there are two buttons: 'Select' and 'Clear'.

## 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.



# 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)

The screenshot shows a web-based form titled "Query Record" with a dark blue background. It contains the following fields and options:

- Employer ID:** A text input field with a grey border.
- Window Length:** Two checked checkboxes:  One Year Window and  Five Year Window.
- Eligibility Status:** Five checked checkboxes:  Eligible,  Not Eligible,  May Be Eligible,  Withdrawal Complete, and  Approaching Close of Window.
- Buttons:** Two buttons at the bottom: "Select" and "Reset".

# EMIS system codes

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

<b>System 4</b>	<b>TRSL Regular Plan</b> – Defined Benefit Plan for “teachers” in TRSL eligible positions
<b>System 6</b>	<b>ORP (Optional Retirement Plan)</b> – Defined Contribution Plan; for employees who choose ORP instead of TRSL’s Regular Plan (System 4) – available for unclassified employees at Louisiana public institutions of higher education

# 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):

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Inquiry                               | <input type="checkbox"/> Enrollments             | <input type="checkbox"/> Sick/annual leave    |
| <input type="checkbox"/> Prior year certifications/corrections | <input type="checkbox"/> Terminations            | <input type="checkbox"/> Agency Certification |
| <input type="checkbox"/> Retiree insurance deduction           | <input type="checkbox"/> File submission         | <input type="checkbox"/> Salary report (only) |
| <input type="checkbox"/> Home address update                   | <input type="checkbox"/> Contribution correction | <input type="checkbox"/> ORP salary report    |



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**Authorized Contacts**  
(Form 1) — Multiple pages accepted: Page    of

**EO-1**  
rev. 01/22

OK to image

Employer ID (###)

**HOW TO SUBMIT:**

**MAIL IN**

8401 United Plaza Blvd, Ste 300  
Baton Rouge LA 70809

**Submit ORIGINAL form ONLY.**  
No copies, faxes, electronic signatures, or scans accepted.

**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. **Personnel designated as authorized signers must sign the form in their respective sections.** Notify TRSL if a contact changes so that unauthorized personnel will not have access to TRSL records. Authorized signers 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. **This form is intended for changes/additions/deletions. You do not need to include all employees already on the list.**

**Section 1 — Agency information**

Employer name	Agency website
Street address / PO box	City, state, 9-digit zip code
Telephone number (include area code)	Fax number (include area code)

**Section 2 — Personnel information (Must be an authorized signer to have access rights in addition to INQUIRY)**

Name of designated personnel Email address (REQUIRED)

1. Telephone number (include area code)

Title

Authorized signer?  YES  NO Check desired access rights from the following (See back of form for descriptions):

<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 employers with no more than 100 employees)
<input type="checkbox"/> Home address update	<input type="checkbox"/> Contribution correction	<input type="checkbox"/> ORP salary report (only employers with no more than 100 employees)

NOTE: If "NO" is checked, Inquiry is the only access right allowed.

Authorized signer's signature (Sign only if "YES" box checked above) Date signed (mm/dd/yyyy)

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Name of designated personnel Email address (REQUIRED)

2. Telephone number (include area code)

Title

Authorized signer?  YES  NO Check desired access rights from the following (See back of form for descriptions):

<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 employers with no more than 100 employees)
<input type="checkbox"/> Home address update	<input type="checkbox"/> Contribution correction	<input type="checkbox"/> ORP salary report (only employers with no more than 100 employees)

NOTE: If "NO" is checked, Inquiry is the only access right allowed.

Authorized signer's signature (Sign only if "YES" box checked above) Date signed (mm/dd/yyyy)

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**To delete a previous designee, provide name(s) to be deleted below. Please complete a TRSL Employer Directory Contact (Form 1EDC) to designate a replaced directory contact.**

Name to be deleted	Name to be deleted	Name to be deleted

**Section 3 — Agency certification**

*I certify that the above designated employee(s) is authorized to access and certify data maintained by the Teachers' Retirement System of Louisiana.*

Name of superintendent/head of agency/agency head designee (PLEASE PRINT)

Signature of superintendent/head of agency/agency head designee (DO NOT PRINT OR TYPE) Date signed (mm/dd/yyyy)

For a description of online access rights, please see back of form.

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# EMIS access rights

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

# EMIS access rights (cont'd)

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




# 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.**



**TRSL**  
Teachers' Retirement  
System of Louisiana

**Employer Directory  
Contacts (Form 1EDC)**

**EO-1**  
rev. 07/21

OK to image

Employer ID (###)

**Submit ORIGINAL form ONLY. No copies, faxes, electronic signatures, or scans are accepted.**

**HOW TO SUBMIT:**

**MAIL IN**

8401 United Plaza Blvd, Ste 300  
Baton Rouge LA 70809

**Print in ink or type all entries.** Designate personnel who will serve as information contacts, not necessarily authorized signers, for the Teachers' Retirement System of Louisiana (TRSL). TRSL uses these contacts for mailed request letters and general questions. Please submit a completed *Authorized Contacts (Form 1)* to add/delete authorized signer(s).  
**You only need to list contacts that change. (You do not have to list everyone.) ONLY ONE contact per category**

**Section 1 — Employer information**

Employer name  Date (mm/dd/yyyy)

**Section 2 — Administrative personnel (Include appropriate professional and/or courtesy title, e.g. Dr. / Mr. / Mrs. / Ms.)**

Category	Name (ONLY ONE per category)	Position	Phone number (include area code)	Ext. #	Email
Agency head					
Agency head designee					
Business manager					
Director of finance					
Director of personnel/ human resource mgr					
Director of food services					
President of school board					

**Section 3 — Support personnel (contact for) — ONLY ONE contact per category.**

Contribution Reports					
Data Processing					
Optional Retirement Plan (ORP)					
Payroll					
Personnel					
Retirement					

# Keep employer contacts up to date

Use *Employer Directory Contacts* (Form 1EDC) to update Employer Contacts.



Use *Authorized Contacts* (Form 1) to give and remove online access rights.

### Employer Contacts

LA 71 SCHOOL Phone: [redacted]  
 Fax: [redacted]  
 Status: Active  
 Employer Type: [redacted]  
 Charter School: No  
 Revised: 10/07/2020

Web Address: [redacted]

Code	Title	Name	Phone	Ext	E-Mail
AH	EXECUTIVE DIRECTOR	[redacted]	[redacted]	[redacted]	[redacted]
DP	ADMINISTRATIVE ASSISTANT	[redacted]	[redacted]	[redacted]	[redacted]
FS	MANAGER	[redacted]	[redacted]	[redacted]	[redacted]
PS	PRESIDENT	[redacted]	[redacted]	[redacted]	[redacted]
AS	BUSINESS MANAGER	[redacted]	[redacted]	[redacted]	[redacted]

*Description of Contact Codes*

AH Agency Head	AD Agency Head Designee	AS Authorized Signer	BM Business Manager
CR Contribution Reporting	DF Director of Finance	DP Data Processing	FS Director of Food Service
DC ORP Contact	PC Personnel Contact	PH Personnel Head	PR Payroll Contact
PS President of School Board	RC Retirement Contact		

\* Authorized to sign retirement forms

### Update Permissions

*Description of Update Codes*

INQ Inquiry	ADR Address Change	ENR Enrollment	TRM Termination
CCR Contribution Correction	PYC PY Salary Correction	SLU Sick Leave Update	INS Insurance Deductions
SAL Salary Entry	ORP ORP Entry	AGC Agency Certification	FSM File Submission


Authorized User	INQ	ADR	ENR	TRM	CCR	PYC	SLU	INS	SAL	ORP	AGC	FSM	
J		X	X	X	X	X	X				X	X	X
C		X	X	X	X	X	X				X	X	
T		X	X	X	X	X	X			X	X	X	

**Tip:** Review *Employer Contacts* screen often



# Index 2.0: TRSL Membership

Employer's reference guide on TRSL membership eligibility and enrollments process for non-retirees



**EMPLOYER MANUAL** INDEX 2.0

**INDEX 2.0: TRSL Membership**
March 2022

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\(35\)](#)
- 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.

This handbook summarizes these rules in less legalistic terms; however, it is not a complete description of the law. For a complete reference guide, refer to sections of [Title 11 of the Louisiana Revised Statutes](#) that pertain to TRSL.

Employers should keep the following responsibilities in mind when reporting TRSL members:

- You are responsible for documenting the Member Summary screen in EMIS to verify a member's status in TRSL.
- You are responsible for making the initial determination of an employee's eligibility for membership. The following pages explain the membership rules that currently apply. Please review these pages when making your eligibility determination.
- You are responsible for documenting your decision regarding an employee's eligibility. Your documentation will help protect you in the event questions arise about a decision you have made.

1. You are responsible for reporting eligible members and retirees to TRSL.
2. You are responsible for reporting TRSL members to TRSL.
3. You are responsible for reporting TRSL members to TRSL.
4. You are responsible for regularly reviewing the determinations you have made. By doing so, you can ensure that you are reporting correctly.
5. All employers are responsible for reporting eligible members and retirees returning to work from the first day of hire.

**CONTENTS**

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- [Plan types](#)
- [Membership eligibility](#)
- [Ineligible employees](#)
- Special conditions**
- [Part-time, seasonal, or temporary employees](#)
- [Visas](#)
- [No Social Security number](#)
- [Employees who contribute to two different systems](#)
- [Charter organizations with multiple charter schools](#)
- [Dual positions in Plan B parishes](#)
- [Retaining TRSL membership](#)
- [Employer responsibilities](#)
- [Linking procedures](#)
- [EMIS instructions for](#)

**REQUIRED FORMS**

- [Statement Concerning Your Employment in a Job Not Covered by Social Security \(Form 255\)](#)
- [Forfeiture of Retirement Benefits - Attestation of Understanding \(Form 2FRB\)](#)
- [Beneficiary Designation for Non-Retired Members \(Form 3\)](#)

1
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2.0 - TRSL Membership

# TRSL membership eligibility (Non-retirees)

## Eligible positions per definition of “Teacher” – R.S. 11:701(35)

All **unclassified** employees at public college/university or higher education governing board

*Lab school employees: other than bus drivers and maintenance personnel*

Visa holders other than F-series or J-series

- *Exception: J-1 visa holders are TRSL eligible*

### **Employment status:**

Work **at least half** of what the college or university considers full-time **or** more than 20 hours per week (employees who work 20 hours or less or less than 50% effort are considered part-time) **and/or** the position is **not** seasonal or temporary

- **Seasonal:** An employee who works on a full-time basis **less** than five months in a year
- **Temporary:** Any employee performing services under a **contractual arrangement** with the employer of **two years or less** in duration

# 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:

### Ten (10) year rule

- Ten or more years of eligibility service credit
- W-2 employees only
- Can work 20 hours or less per week or less than 50% effort

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

- Five or more years of eligibility service credit
- Applies ONLY to lab school classroom teachers who are paid with W-2 earnings
- Can work 20 hours or less per week



# 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*

# Membership Eligibility - SPECIAL CONDITIONS

## Form 1099 payments – *certain criteria (Non-Retirees)*

- W-2 covered employee at another TRSL-eligible employer that meets Primary Employment criteria
- Concurrently working part-time/seasonal/temporary at another TRSL-covered employer in a TRSL-covered position and receives **Form 1099 payments** at the secondary agency

---

Enroll under “Secondary” employer type if any of the following occur:

- The individual 1099 contract is for **more than \$1,000**
- The cumulative amount of 1099 payments issued by a single employer to the employee **exceeds \$15,000 in a fiscal year**, then all payments **in excess of \$15,000** are considered earnable compensation

- *Do not report 1099 earnings ONLY for TRSL non-retirees.*
- *Non-retiree must be a current W-2 employee who meets Primary Employment criteria at another TRSL-eligible employer.*
- *1099 limitations do not apply to TRSL RTW retirees*

# Adjuncts (Non-retirees)

Traditional adjuncts teach scheduled number of credit hours each semester

- *Must determine eligibility **EACH** semester*

## Eligibility to enroll Adjuncts:

- Must have 10 years TRSL service credit for eligibility to include part-time, seasonal, or temporary adjuncts or
- Must work at least 50% of Full-time and **NOT** be seasonal or temporary or
- Must meet Secondary Employment criteria to include part-time, seasonal, or temporary adjuncts

**SECONDARY EMPLOYMENT:** Part-time/seasonal/temporary employee working in a TRSL-eligible position at your agency and also has an existing primary enrollment with another TRSL-reporting agency

# Enrollments process

## Documents to include in hiring packet

- 1. Enrollment Application/Employment Notification (Form 2) - optional**
  - Do not submit to TRSL. Use to process online enrollment.
- 2. Forfeiture of Retirement Benefits/Attestation of Understanding (Form 2FRB)**
  - Do not submit to TRSL. TRSL will request if needed.
- 3. Statement Concerning Your Employment in a Job Not Covered by Social Security (Form 2SS)**
  - Submit a copy of the form to TRSL; employer retains the original
- 4. Beneficiary Designation for Non-Retired Members (Form 3)**
  - Submit original to TRSL timely
  - Employee/member responsibility to submit form

# Enrollments process

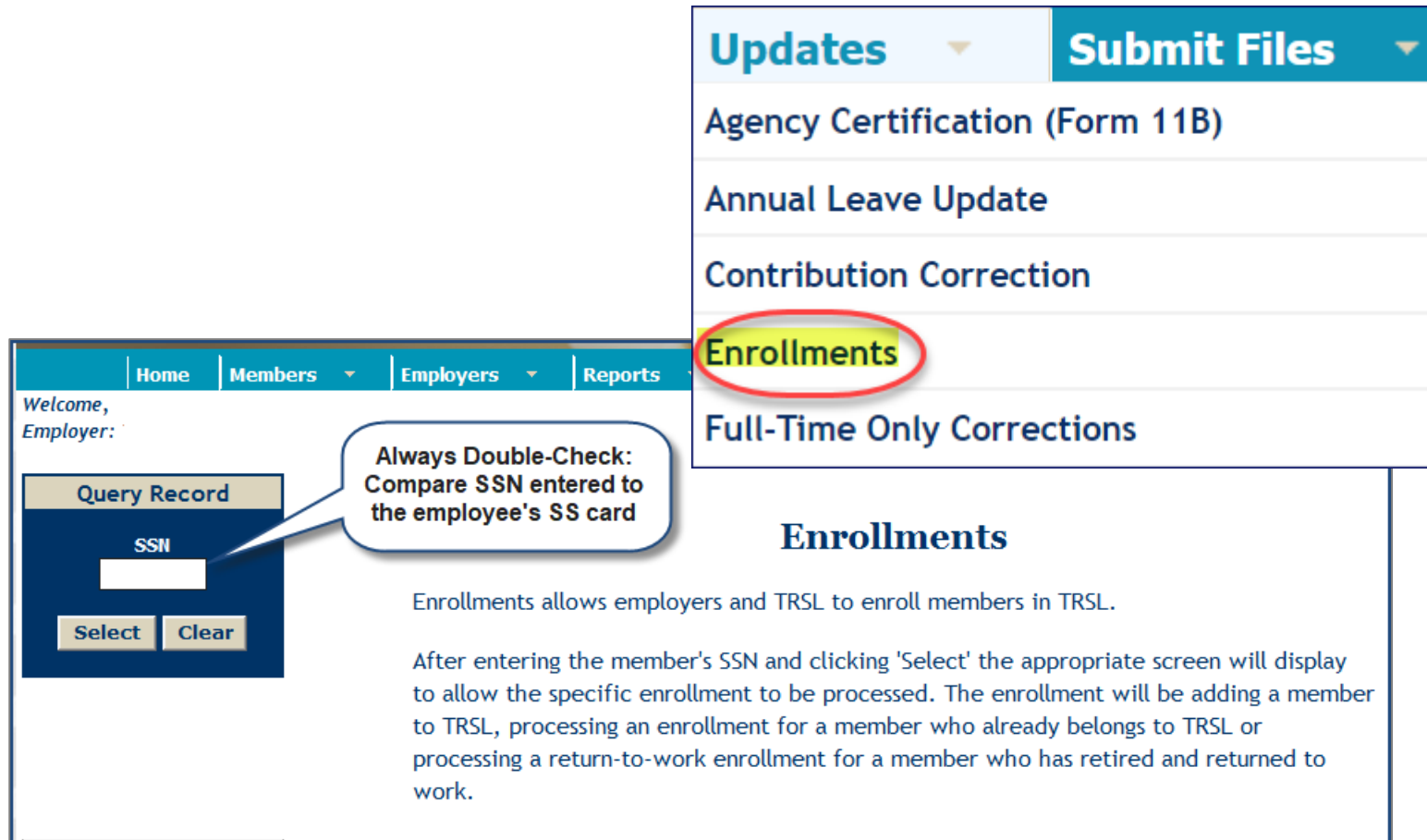
## Online enrollments in EMIS

### Enrollment deadlines from date of hire:

- 60 days for *active members*
- 30 days for *retirees*

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

**Tip: Do Not** enroll an employee using an invalid "dummy" SSN



The screenshot displays the EMIS system interface. At the top, there is a navigation bar with 'Home', 'Members', 'Employers', and 'Reports'. Below this, a 'Welcome, Employer:' message is visible. The main content area features a 'Query Record' form with 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, a dropdown menu is open, showing options: 'Updates', 'Submit Files', 'Agency Certification (Form 11B)', 'Annual Leave Update', 'Contribution Correction', 'Enrollments' (highlighted with a red circle), and 'Full-Time Only Corrections'. Below the menu, the 'Enrollments' section is titled, followed by the 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.'

Must have Enrollments access right designated on Authorized Contacts (Form 1)



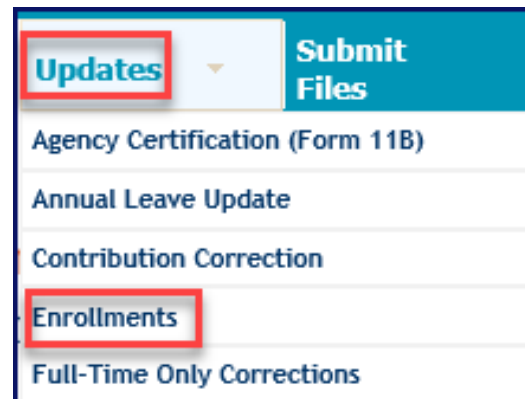
# Enrollments screen

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

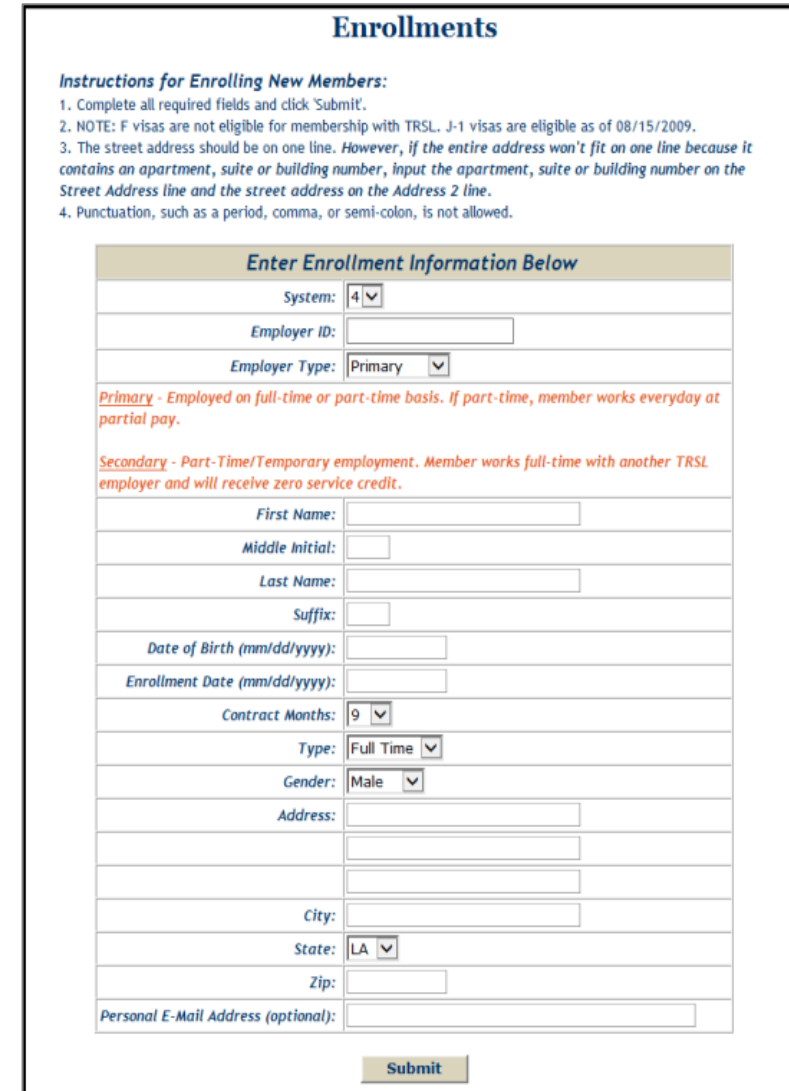
## Tips:

- **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.



A vertical navigation menu with a blue header. The header contains a dropdown menu labeled 'Updates' and a button labeled 'Submit Files'. Below the header are several menu items: 'Agency Certification (Form 11B)', 'Annual Leave Update', 'Contribution Correction', 'Enrollments', and 'Full-Time Only Corrections'. The 'Enrollments' item is highlighted with a red rectangular box.



The 'Enrollments' form is titled 'Enrollments' and includes 'Instructions for Enrolling New Members' and a form titled 'Enter Enrollment Information Below'. The instructions list four steps: 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.

The form fields include: System (dropdown: 4), Employer ID (text), Employer Type (dropdown: Primary), First Name (text), Middle Initial (text), Last Name (text), Suffix (text), Date of Birth (mm/dd/yyyy) (text), Enrollment Date (mm/dd/yyyy) (text), Contract Months (dropdown: 9), Type (dropdown: Full Time), Gender (dropdown: Male), Address (text), City (text), State (dropdown: LA), Zip (text), and Personal E-Mail Address (optional) (text). A 'Submit' button is located at the bottom right of the form.

# Enrollments – SPECIAL CONDTIONS

## 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*
- Submit a Form 2TR, *Election to Join TRSL after ORP Participation*, if ORP participant is eligible to join TRSL

The screenshot displays the TRSL website interface. At the top, the logo for TRSL (Teachers' Retirement System of Louisiana) is visible. Below the logo is a navigation menu with links for Home, Members, Employers, Reports, Updates, Submit Files, and Logout. A personalized greeting reads "Welcome, Sharon! Employer:". On the left side, there is a "Query Record" section with an input field for "SSN" containing the number "10" and two buttons: "Select" and "Clear". The "Select" button is highlighted with a red border. On the right side, a message in blue text reads "Enrollments" followed by "ORP status exists." in red text on a yellow background.

# 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

SSN: [REDACTED]	Address Date:08/11/2009
Name: [REDACTED]	Address: [REDACTED]
Gender:Female	
Birth Date: [REDACTED] Age: 62	
Folder Imaged Date:01/12/1998	
ORP First Eligible Date:12/15/1997 Inferred	
ORP to TRSL Election Eligibility:One Year Window, TRSL Eligible until 6/30/2025	
ORP Carrier:TIAA	
Fiscal Year:2025	

#### Status Information

Sys	Seq	Status	Code	Date	DROP Record
6		<u>ORP MEMBER</u>	(0)	12/15/1997	

# Joining TRSL after ORP Participation

## 1 Year Window vs. 5 Year Window

### ORP Participants with a 5-Year Window to Join TRSL

- ORP First Eligible Date on/after Aug. 1, 2020, and were active and contributing at time of election
- 5-Year Window beginning on ORP First Eligible Date
- 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

SSN: 1 [redacted] Address Date: 08/02/2024  
Name: [redacted] Address: 4 [redacted]  
Gender: Female  
Birth Date: [redacted] Age: 23

ORP First Eligible Date: 4/4/2024 Inferred  
ORP to TRSL Election Eligibility: **Five Year Window, TRSL Eligible until 4/4/2029**  
ORP Carrier: TIAA  
Fiscal Year: 2025

#### Status Information

Sys	Seq	Status	Code	Date	DROP Record
6		<a href="#">ORP MEMBER</a>	(0)	04/04/2024	

# Form 2TR: Election to Join TRSL after ORP Participation

Use this form to enroll eligible ORP participants into TRSL's defined benefit plan if they make that election

- Must submit **original** form.
- Employee fills out 1<sup>st</sup> page
- Employer fills out 2<sup>nd</sup> page

**TRSL** Election to Join TRSL after ORP Participation (Form 2TR) **EMPLOYER USE ONLY** **00-TR**  
TRSL agency number (9999) (REV. 12/24)

**APPLICANT:** Submit this form to your Human Resources office to complete the enrollment process with TRSL. **Submit ORIGINAL form ONLY. No copies, faxes, or scans accepted.**

**Print in ink or type all entries except signatures and initials.** Incomplete forms will be returned. This is a form to be used by eligible Optional Retirement Plan (ORP) participants to make an irrevocable election to leave the ORP and join the TRSL defined benefit plan. **PLEASE NOTE: Once you have read the form and completed Section 1, please submit the form to your Human Resources office to complete the enrollment process with TRSL.**

**Section 1 — Member information and acknowledgments (to be completed by applicant)**

Name (last, first, MI, suffix (jr, III, etc.))  Social Security number (999-99-9999) **REQUIRED**

Street address / PO box  City, state, zip  Primary email address

Daytime telephone (include area code)  Alternate telephone (include area code)  Date of birth (mm/dd/yyyy)

Are you a U.S. citizen?  Yes  No  Type of visa

**REQUIRED** Read and handwrite your initials beside each of the following statements:

- I am an Optional Retirement Plan (ORP) participant who hereby makes a one-time irrevocable election to cease participation in the ORP in order to become a new member of the 2015 regular plan of the Teachers' Retirement System of Louisiana, as outlined in La. R.S. 11:932. I understand that I (1) can never again participate in the La ORP; (2) shall not be allowed to transfer my ORP time into TRSL; (3) may not receive a distribution from my ORP account until all employment has ended.
- I understand that by making the election provided for by La. R.S. 11:932 I am seeking to enroll in the **TRSL 2015 Retirement Plan**, which is a defined benefit pension plan. I further understand that under this plan I will be eligible for retirement benefits once I reach age 52 with five years of service credit earned after the effective date of my election, or for an actuarially reduced retirement benefit at any age with twenty years of service credit earned after the effective date of my election. I further understand that I will be eligible for disability and survivors' benefits only once I have earned sufficient service credit accrued after the effective date of my election to be eligible for those benefits.
- I understand that my election to leave the ORP and enroll in the TRSL defined benefit plan will be effective only after the receipt of all required documentation by TRSL and subject to the timing set forth in La. R.S. 11:932.
- I understand that, if all required documentation related to my election under La. R.S. 11:932 is not received by TRSL prior to the expiration of the time period set forth in La. R.S. 11:932 for me to make that election, then the election will be invalid and I will no longer be eligible to leave the ORP and join the TRSL defined benefit plan. In such event I understand that I will remain a participant in the ORP.
- I understand that, as a result of my decision to make the election provided for by La. R.S. 11:932, any service credit remaining in the TRSL defined benefit plan that I may have earned prior to the effective date of this election will only be used for benefit computation purposes and not for eligibility for retirement, disability or survivors' benefits.

I have read and fully understand each of the foregoing statements in **Section 1 - Member information and acknowledgments**, as confirmed by my initials placed beside each statement. In full awareness of this information and all related legal requirements, I have determined that I wish to make the election outlined in La. R.S. 11:932.

**REQUIRED SIGNATURE** (Please sign with an ink pen. Electronic signatures are not accepted.)  Date signed (mm/dd/yyyy)

**Employer must complete reverse side.**

PO Box 94123 • Baton Rouge, LA 70804-9123 • 1-877-ASK-TRSL (1-877-275-8775) • www.TRSL.org • web.master@trsl.org

**TRSL** Election to Join TRSL after ORP Participation (Form 2TR) **Member's SSN**  **00-TR**  
(REV. 12/24)

**Section 2 — Employer information (to be completed by employer)**

Name of employer  TRSL agency number (9999)

Employee's position  Date of employment (mm/dd/yyyy)

Rate of employment:  9 months  10 months  11 months  12 months

Employment status:  Full-time  Part-time

A part-time employee is any employee who normally works 20 hours or less per week or, if employed in higher education at a college, a university, including job schools, or technical college, works less than half of what the university or college considers full-time.

High Education: This employee will teach \_\_\_\_\_ credit hours per semester. Full-time equals \_\_\_\_\_ credit hours per semester.

All other employers: This employee will work \_\_\_\_\_ hours per week. Full-time equals \_\_\_\_\_ hours per day.

Is the participant a seasonal or temporary employee?  Yes  No

**Definition of seasonal employee.** A seasonal employee is any employee who normally works on a full-time basis less than 5 months in a year.

**Definition of temporary employee.** A temporary employee is any employee performing services under a contractual arrangement with the employer of 2 years or less duration.

**Section 3 — Forfeiture of benefits / Employer attestation (to be completed by employer - Check the appropriate box below.)**

**YES**, employee has signed Form 2TR-B. I hereby certify that this employee has received and executed TRSL's Forfeiture of Retirement Benefits - Attestation of Understanding (Form 2TR-B), and that this form will be permanently maintained in the personnel records of this employer.

**NO**, employee has not yet signed Form 2TR-B. State law requires that this employee receive and execute TRSL's Forfeiture of Retirement Benefits - Attestation of Understanding (Form 2TR-B, La. R.S. 11:279) (the enrollment of this employee cannot be completed until Form 2TR-B is properly executed in compliance with state law).

**REQUIRED SIGNATURE** Signature of employer's authorized representative (DO NOT PRINT OR TYPE)  Date signed (mm/dd/yyyy)

**REQUIRED SIGNATURE** Name of authorized representative (print or type)  Title

**Upon completion, please mail the ORIGINAL page 1 and page 2 of this form to TRSL Employers. Please make sure you fill in the employee's TRSL agency number at the top of page 1.**

PO Box 94123 • Baton Rouge, LA 70804-9123 • 1-877-ASK-TRSL (1-877-275-8775) • www.TRSL.org • web.master@trsl.org



**CONTENTS**[Key features of the ORP](#)[ORP contributions](#)[ORP carriers](#)[Eligibility](#)[ORP-eligible employers](#)[Determining employee eligibility](#)[ORP eligibility for non-higher education employees](#)[Timeframe for choosing to participate in ORP](#)[Transfer of funds from TRSL Regular to ORP](#)[Enrollment - Form 16](#)[Monthly ORP salary and contribution reports](#)[How to start your ORP](#)[How to participate in your ORP](#)[Employees on sabbatical](#)[Recovering overpayments](#)[Carrier changes \(Form 16\)](#)[Re-employing an ORP participant](#)[Terminations](#)[Rollover requests](#)[Frequently asked questions](#)

The Optional Retirement Plan (ORP) is a defined contribution plan and an alternative to the defined benefit plan administered by TRSL. The ORP was established on July 1, 1990, to provide retirement benefits to eligible participants while affording maximum portability.

Eligible employees make an **irrevocable** election to participate in ORP. ORP participants are not considered TRSL members.

**Key features of the ORP:**

- An ORP account is owned by the participant, and there is no waiting period to join the plan.
- ORP accounts are portable.
- ORP participants control their own investments.
- Employee and employer contributions are invested by the designated ORP carrier in the investment option chosen by the participant.
- Participants are 100% vested from the date of ORP enrollment.

**ORP contributions**

ORP participants and their employers contribute to ORP accounts in accordance with LSA-R.S. 11:927. These contributions are calculated based on a percentage of the participant's salary, as defined in the plan document.

Employers must withhold the correct contribution amounts from participating employees' payroll compensation and remit both

# Index 16.0: Optional Retirement Plan (ORP)

Provides information on the Defined Contribution Plan available to academic and unclassified employees of Louisiana colleges, universities, and community colleges

# What is the Optional Retirement Plan (ORP)?

## A Defined Contribution (DC) Plan

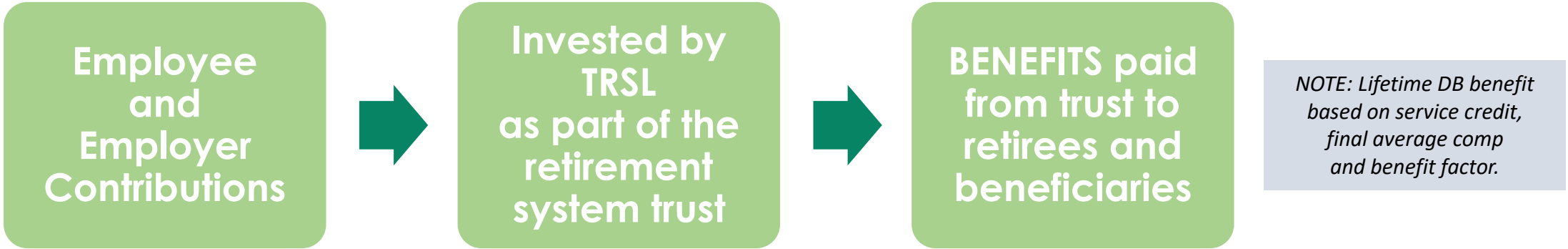
- Established July 1, 1990
- Available to unclassified employees of public institutions of higher education and their governing boards
- Designed to accommodate the higher education community with retirement benefits that are fully portable to other U.S. colleges and universities.

**The decision to participate in the ORP is irrevocable, except as provided in La. R.S. 11:932 (Act 109 of 2024).**

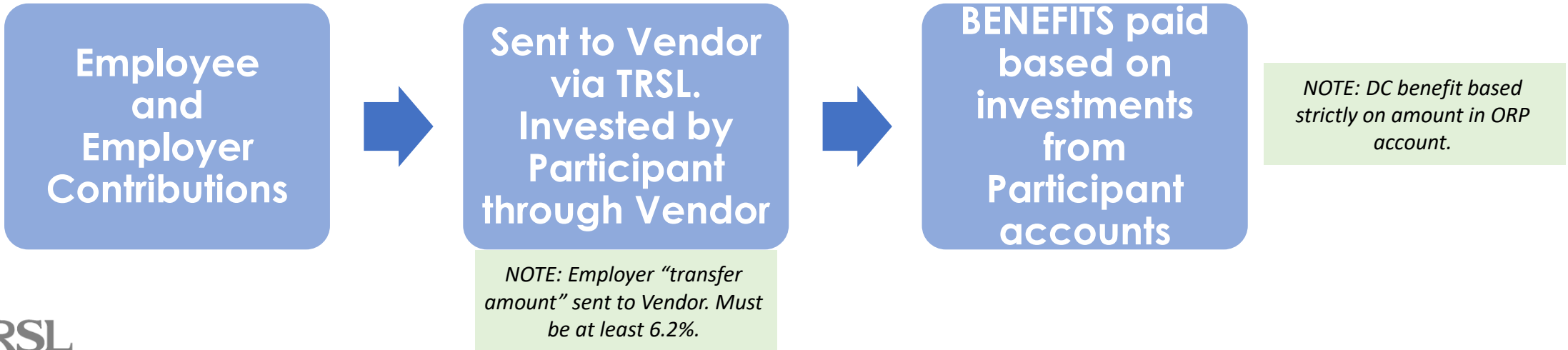


# An alternative to TRSL

## TRSL Regular Plan (Defined Benefit)



## ORP (Defined Contribution)



# Current ORP carriers



## Participants control their own investments through private carriers

- Employee & employer contributions are invested by the ORP carrier in the investment option(s) chosen by the employee
- Participants are 100% vested from date of enrollment

# ORP Eligibility

**The ORP should be offered to individuals in academic or unclassified positions within higher education; who**

- Are directly employed (W2 employee); and
- Are not vested in TRSL (less than 5.0 years of eligibility credit); or
- Are vested in TRSL but are being employed in higher education for the first time (election must be made within 60 days of new employment).

*Example: A TRSL regular member with 10 years of service credit with a K-12 employer changes jobs and is now, for the first time, working as an unclassified employee at a higher education institution.*

- ORP **is offered** to full-time, part-time, seasonal, and temporary employees
- ORP **is not offered** to
  - employees of technical colleges or K-12 agencies
  - Individuals employed by contract or corporate contract

# Irrevocability and Act 109

Participation in the ORP is an Irrevocable election, except as outlined in La. R.S. 11:932 (Act 109 of 2024). Therefore, continued participation in the ORP is required when

- Employee changes employers, even if employed outside higher education
- Employment status/capacity changes to part-time, seasonal, or temporary

**Act 109 provides eligible ORP participants with a one-time window in which they can elect to leave the ORP and join TRSL as a brand-new member of the 2015 retirement plan.**

- If not eligible under Act 109, or once eligibility window closes, the employee shall remain a participant of the ORP

# ORP Effective Dates

Determined by the timeframe in which the employee made the election.

- If election form signed within the first 60 days of hire
  - Effective date will be the date of hire
- If election form signed more than 60 days from date of hire
  - Effective date is the first of the month, determined by employee's signature date
  - If signed 1<sup>st</sup> – 15<sup>th</sup>, will be 1<sup>st</sup> of **current** reporting month
  - If signed 16<sup>th</sup> – 31<sup>st</sup>, will be 1<sup>st</sup> of **next** reporting month

Individuals employed in a TRSL-eligible position and capacity should be reported on the Regular System 4 salary file until their decision is made.

**TRSL** Application for Optional Retirement Plan or Change of Carrier (Form 16) 00-16  
rev. 7/24

**APPLICANT:** Submit this form to your Human Resources office to complete the enrollment process with TRSL. **Submit ORIGINAL form ONLY.**  
No copies, faxes, or scans accepted.

Print in ink or type all entries except signatures. Incomplete forms will be returned. This is a multipurpose form to be used by individuals joining the Optional Retirement Plan (ORP) or by ORP participants changing carriers. The reverse side of this form contains important information about the ORP. **PLEASE NOTE: Once you've read the form and completed Sections 1-3, please submit the form to your Human Resources office to complete the enrollment process with TRSL.**

**Section 1 — Applicant information**

Name: Last, first, MI, suffix (Jr., III, etc.) \_\_\_\_\_ Date of birth (mm/dd/yyyy) \_\_\_\_\_ Social Security number (###-##-####) \_\_\_\_\_  
Street address / PO box \_\_\_\_\_ City, state, zip \_\_\_\_\_  
Daytime telephone (include area code) \_\_\_\_\_ Email address \_\_\_\_\_  
Sex  Male  Female U.S. citizen?  YES  NO Type of visa: \_\_\_\_\_

**To be completed only by current members of the Teachers' Retirement System of Louisiana: CHOOSE ONE**

I elect to transfer my accumulated TRSL contributions to the ORP carrier I have designated below.  
 I elect NOT to transfer my accumulated TRSL contributions to the ORP carrier I have designated below.

**Section 2 — Carrier designation**

New enrollment  Name of ORP carrier \_\_\_\_\_ ORP carrier code \_\_\_\_\_  
 Change of ORP carrier  VOYA Financial (formerly ING Life Insurance and Annuity Company)  01 VOYA  
 Existing ORP participant  Teachers Insurance and Annuity Association - TIAA (formerly TIAA-CREF)  02 TIAA  
 Corebridge Financial (formerly VALIC / AIG)  03 Corebridge

**Section 3 — Applicant's signature**

I hereby make application for the Optional Retirement Plan (ORP) in accordance with La. R.S. 11:921-932. I understand that future employee contributions, less any administrative fee adopted in accordance with law, and the employer transfer amount will be forwarded to the ORP carrier designated above. **I have read the back of this form. I understand that (1) the benefits payable under the ORP are not the obligation of the State of Louisiana or TRSL, but are solely the liability and responsibility of the designated ORP carrier; (2) I hereby expressly waive my rights set forth in Louisiana Constitution Article X Sec. 29 (A) and (B), which are printed on the back of this form; and (3) no lump-sum payout of the entire account can be made from the ORP carrier directly to me during my lifetime.**

Applicant's signature (DO NOT TYPE OR PRINT) \_\_\_\_\_ Date signed (mm/dd/yyyy) \_\_\_\_\_

**Section 4 — Agency certification (must be completed by employer prior to submission to TRSL)**

Agency name \_\_\_\_\_ TRSL agency number (###) \_\_\_\_\_  
Date of hire: \_\_\_\_\_ (mm/dd/yyyy) Current employment status  Full time  Part time  
A part time employee is any employee who normally works 20 hours or less per week or less than 50% effort (higher education).

I certify that this employee is eligible to participate in the ORP according to La. R.S. 11:925 and that he or she has signed a contract with the carrier designated above.

Signature of authorized representative of agency (DO NOT TYPE OR PRINT) \_\_\_\_\_ Date signed (mm/dd/yyyy) \_\_\_\_\_  
Name of authorized representative \_\_\_\_\_ Title \_\_\_\_\_

**Employer:** Please drop off or mail this form to TRSL at 8401 United Plaza Blvd, Ste 300, Baton Rouge LA 70809  
**See reverse side for important information**  
PO Box 94123 • Baton Rouge, LA 70804-9123 • 1-877-ASK-TRSL (1-877-275-8775) • www.TRSL.org • web.master@trsl.org

# ORP Reporting

- Election made **within 60 days** of hire
  - All contributions should be reported under ORP System 6
  - Contributions previously reported under TRSL Regular System 4 should be removed via a CCR
- Election made **more than 60 days** from date of hire
  - Only prospective contributions should be reported under ORP System 6
  - Contributions for salary earned prior to the ORP effective date should be reported to TRSL Regular System 4, if employee is eligible (not part-time, seasonal, or temporary)

**Members who elect to participate in the ORP after contributing to TRSL may elect to have their contributions transferred out of the Defined Benefit Plan and into their ORP account.**

Note: only employee contributions will be transferred to the carrier; TRSL retains the employer contributions in this scenario

# Transfer of ORP Contributions

Once the monthly ORP salary file and applicable payment is received, TRSL transfers the **employee** and **employer portions** of the reported contributions to the ORP carriers.

- ORP participants report/contribute 8% of salary and TRSL retains 0.05% of the 8% as an administrative fee
- Employer portion includes the Transfer Amount and the Shared Unfunded Accrued Liability (UAL), only the Transfer Amount is transferred to the ORP carriers and TRSL retains the UAL portion

Contributions transferred to the ORP participant's carrier	
*Employee	7.95%
**Employer	6.2%
<b>Total transferred to ORP carrier account</b>	<b>14.15%</b>

Total ORP Employer Contribution Rate (FY 2026)	
Transfer Amount	6.2%
Shared UAL	15.17%
<b>Total Employer Contribution Rate</b>	<b>21.37%</b>



# ORP salary & contributions limits

ORP participants are subject to a cap each calendar year, per IRC guidelines.

- Contributions for calendar year 2025 are limited to \$70,000
- The limit includes both the employee and employer contribution amounts

## Optional Retirement Plan (ORP) Maximum Contribution Limits



Calendar Year	Maximum Annual Contribution (Employer & Employee contributions)
2025	\$70,000
2024	\$69,000
2023	\$66,000
2022	\$61,000
2021	\$58,000
2020	\$57,000
2019	\$56,000

# Termination of ORP participants

When an ORP employee terminates employment:

1. Update your HR system with the termination date
2. If applicable, remove the individual's name from your ORP salary file to ensure they are no longer reported
  - Do not report zeroes for participants with no earnings in the current reporting month
  - When the participant initiates a distribution, the ORP carrier will reach out to TRSL for authorization

If contributions were reported within the last six months, TRSL will request:

- Date of termination
- Last month in which contributions were/will be reported
- Depending on the timing of last contributions, the release of the termination date to the ORP carrier to complete the termination process could take 30-60 days



**CONTENTS**

- [Contributions & reporting](#)
- [Earnable compensation](#)
- [Monthly salary & contribution reports](#)
- [Special cases](#)
- [Leave without pay](#)
- [Docked by substitute](#)
- [Extended sick leave](#)
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- [100% accrual](#)
- [Part-time employees](#)
- [Workers' compensation](#)
- [DROP participation](#)
- [Highly compensated employees](#)
- [Louisiana law](#)
- [Dual positions - Plan B](#)
- [Employer account screens](#)

**Contributions and reporting**

As a participating TRSL reporting agency, accurate and timely contribution reporting and payments is an important part of your TRSL reporting duties.

This index provides information and instructions for TRSL reporting agencies to accomplish the following:

- withhold employee and employer contributions on all TRSL-eligible earnable compensation
- prepare and submit accurate and timely contribution reports
- remit contributions promptly and review employer account activity to ensure accurate credits, payments, and adjustments for your agency's accounts
- identify and correct any previously reported contributions for current year and prior years requiring corrections
- process terminations for TRSL-covered employees who have resigned or are no longer eligible to contribute to TRSL

Louisiana law mandates that participating employers and covered employees contribute to TRSL. These contributions and investment earnings fund benefits paid out to TRSL members and their beneficiaries.

Contributions are calculated based on a member's gross earnable compensation.

Employers must withhold the correct contribution amounts from TRSL-eligible employees' pay to be reported to TRSL each transmittal report.

**Current member contribution rates**

<b>School Lunch Plan A</b>	<b>9.1%</b> (System Code 2)
<b>School Lunch Plan B</b>	<b>5.0%</b> (System Code 3)
<b>Regular Plan</b>	<b>8.0%</b> (System Code 4)

- [Contributions corrections](#)
- [Prior year salary corrections](#)
- [Rollover earnings](#)
- [Sheltered/unsheltered contributions](#)
- [Terminations](#)
- [Frequently asked questions](#)

# Index 4.0: Contribution Reporting & Corrections

Provides information on salary and contribution reporting, including instructions for identifying and correcting reported contributions for current and prior years

# 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				
			Normal Cost	Admin Expense Rate	AFC Rate*	Shared UAL	Total Employer Contribution
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%	3.05%	0.36%	1.75%	15.17%	20.33%
	Higher Ed Regular Plan	8.0%					
2024-25	K-12 Regular Plan	8.0%	3.73%	0.38%	1.50%	15.90%	21.51%
	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*

# 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)

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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

# Examples of Payments That Are Not Earnable Compensation

- Payment in lieu of unused sick or annual leave
- 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

# 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



# Types of contributions

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

<b>Tax sheltered (Type 30)</b>	<b>Tax unsheltered (Type 10)</b>
<ul style="list-style-type: none"><li>• Active members only (including members working after DROP)</li><li>• Includes paid sabbatical or extended sick leave (only for lab schools)</li><li>• Employees on workers' compensation and using their sick leave</li></ul>	<ul style="list-style-type: none"><li>• Employees on workers' compensation (contributions via third-party payments)</li><li>• USERRA payments</li><li>• 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.</li><li>• Employer contributions</li></ul>

# 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.

# 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.

# Identifying Errors from Monthly Salary/Contribution Reports

Two reports available:

- **Contribution Exceptions**
- **Salary Rejections**

Both reports 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](http://www.TRSL.org)*

# 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 EMIS

- Available for **Defined Benefit** retirement plan (System 4)
- Two ways to retrieve report
  - Clicking on “Error” link
  - “Generate Report” button



Employer Contribution Charges						
TRSL - REGULAR		Employer: SB				
Fiscal Year: Current Fiscal Yr		Show Rejections				
Month		Earnings	Sheltered	Unsheltered	Full-Time	Employer
JUL	<b>Error</b>	<i>Transmittal</i>	149,081.67	11,156.39	770.12	165,116.42
		<i>Rejections</i>	1,509.50	120.76	0.00	1,509.50
		<i>CCRs</i>	0.00	0.00	0.00	0.00
		<i>Posted</i>	147,572.17	11,035.63	770.12	163,606.92
AUG	<b>Error</b>	<i>Transmittal</i>	397,220.15	29,619.39	2,158.16	397,220.15
		<i>Rejections</i>	8,300.78	664.06	0.00	8,300.78
		<i>CCRs</i>	0.00	0.00	0.00	0.00
		<i>Posted</i>	388,919.37	28,955.33	2,158.16	388,919.37
SEP	<b>Error</b>	<i>Transmittal</i>	668,776.54	48,442.09	4,602.67	672,039.91
		<i>Rejections</i>	0.00	0.00	0.00	0.00
		<i>CCRs</i>	0.00	0.01	0.00	0.00
		<i>Posted</i>	668,776.54	48,442.10	4,602.67	672,039.91
OCT	<b>Error</b>	<i>Transmittal</i>	547,756.11	38,689.87	4,143.05	550,404.76
		<i>Rejections</i>	0.00	0.00	0.00	0.00
		<i>CCRs</i>	0.00	0.01	0.00	0.00
		<i>Posted</i>	547,756.11	38,689.88	4,143.05	550,404.76
TOTAL	<b>Report</b>	<i>Transmittal</i>	1,762,834.47	127,907.74	11,674.00	1,784,781.24
		<i>Rejections</i>	9,810.28	784.82	0.00	9,810.28
		<i>CCRs</i>	0.00	0.02	0.00	0.00
		<i>Posted</i>	1,753,024.19	127,122.94	11,674.00	1,774,970.96

# 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 BD		
Fiscal Year:		<input type="button" value="Show Rejections"/>				
Month		Earnings	Sheltered	Unsheltered	Full-Time	Employer
JUL	<a href="#">Report</a>	<i>Transmittal</i>	1,237,676.57	97,043.49	19.20	1,240,912.51
		<i>Rejections</i>	7,756.68	620.53	0.00	7,756.68
		<i>CCRs</i>	-5,151.96	-412.16	0.00	-2,697.32
		<i>Posted</i>	1,224,767.93	96,010.80	19.20	1,230,458.51
						303,742.45
AUG	<b>Error</b>	<i>Transmittal</i>	1,648,844.21	130,503.92	132.20	1,649,635.35
		<i>Rejections</i>	8,011.25	607.30	33.60	8,011.25
		<i>CCRs</i>	-4,902.04	-392.16	0.00	-4,902.04
		<i>Posted</i>	1,635,930.92	129,504.46	98.60	1,636,722.06
						405,710.87
SEP	<b>Error</b>	<i>Transmittal</i>	7,348,769.65	581,962.39	4,669.27	7,354,294.04
		<i>Rejections</i>	0.00	0.00	0.00	0.00
		<i>CCRs</i>	-134.48	-25.22	14.46	14,464.76
		<i>Posted</i>	7,348,635.17	581,937.17	4,683.73	7,368,758.80
						1,822,461.52
OCT	<b>Error</b>	<i>Transmittal</i>	10,228,711.78	811,716.36	4,157.77	10,236,007.93
		<i>Rejections</i>	0.00	0.00	0.00	0.00
		<i>CCRs</i>	-11,015.23	-881.22	0.00	2,249.33
		<i>Posted</i>	10,217,696.55	810,835.14	4,157.77	10,238,257.26
						2,533,988.74

# 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”

Home Members Employers Reports Updates Logout

Welcome, Sharon!!  
Employer: TRSL

**Query Record**

System

Fiscal Year: 2023

Select Clear

**NEW! Custom Report Help**

Report Type: Complete Report

Sort Selection: Social Security Number

Generate Report

### Employer Contribution Charges

TRSL - REGULAR Employer: SC BD  
Fiscal Year: 2023 Show Rejections

Month		Earnings	Sheltered	Unsheltered	Full-
JUL <b>Report</b>	Transmittal	1,237,676.57	97,043.49	19.20	1,24
	Rejections	7,756.68	620.53	0.00	
	CCRs	-5,151.96	-412.16	0.00	
	Posted	1,224,767.93	96,010.80	19.20	1,23
AUG <b>Error</b>	Transmittal	1,648,844.21	130,503.92	132.20	1,64
	Rejections	8,011.25	607.30	33.60	
	CCRs	-4,902.04	-392.16	0.00	
	Posted	1,635,930.92	129,504.46	98.60	1,63
SEP <b>Error</b>	Transmittal	7,348,769.65	581,962.39	4,669.27	7,35
	Rejections	0.00	0.00	0.00	
	CCRs	-134.48	-25.22	14.46	1
	Posted	7,348,635.17	581,937.17	4,683.73	7,36

**Recommend Report Type:** Complete Report

**Report Type**

Complete Report

Active Status

Retiree Status

Unknown Name

Enrolled Not Reported

Reported Not Enrolled

**Sort Selection**

Social Security Number

Alphabetically

Exception Message



# Contribution Exception Report

Layout:

- Sort & filter info
- Number of exception records

Leading zeros in SSNs will not appear

Date: 12/29/2023		Teachers' Retirement System of Louisiana - Regular Plan						Page 2 of 2	
Time: 8:44:56AM		Contribution Exception Report						By: Sharonl	
Sorted By: Social Security Number		For Fiscal Year 2023-2024						Exceptions Found: 16	
Filtered By: No Filter		Employer:							
Start Date	Term Date	Status	Status Date	Reporting Period	Contrib Type	Actual Earnings	Contribs	Full-Time Earnings	Exception Message
07/27/2023		<b>M</b> ACTIV-DROP	07/27/2023	08/2023	Sheltered	2,988.42	454.14	2,988.42	Contribution unreasonable.
08/15/2023		<b>S</b> ACTIVE	03/02/2021	09/2023	Unsheltered	807.50	64.60	807.50	Contribution type invalid.
10/27/2021		<b>A S</b> RTW337 EL	10/27/2021	11/2023					RTW member Enrolled not reported.
08/04/2022		<b>CA</b> RTW337 ACT	10/04/2021	07/2023					RTW member Enrolled not reported.
08/07/2003	08/03/2023	<b>B</b> EST RETIRE	08/04/2023	08/2023					Enrolled not reported.

**Tip:** Exception records will delete from report upon each online correction/update

# Retrieving salary rejections

Review Employer Contribution Charges screen in EMIS after posting your monthly salary/contributions report for the applicable retirement plan (System 4).

Click on “**Show Rejections**” button near top of screen.

- Screen will update and display rejected records at bottom of screen in calendar month order.



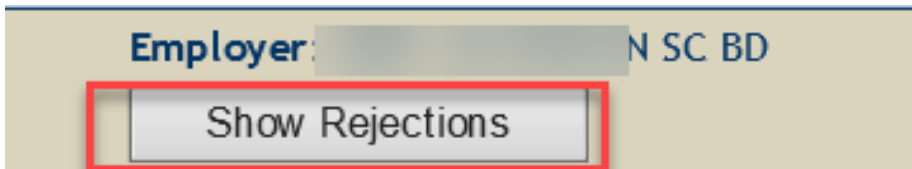
**Employer Contribution Charges**

TRSL - REGULAR      Employer: SC BD  
 Fiscal Year: 2023      **Show Rejections**

Month		Earnings	Sheltered	Unsheltered	Full-Time	Employer
JUL	Report	1,237,676.57	97,043.49	19.20	1,240,912.51	
	Transmittal Rejections	7,756.68	620.53	0.00	7,756.68	
	CCRs	-5,151.96	-412.16	0.00	-2,697.32	303,742.45
	Posted	1,224,767.93	96,010.80	19.20	1,230,458.51	

**Salary Rejections**

Month/Year	SSN	Actual Earnings	Sheltered Contributions	Unsheltered Contributions	FullTime Earnings	Error Message
07/2024		26,728.91	2,138.32	0.00	26,728.91	CONTRIBUTION AMT MUST BE 0
07/2024		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
<b>TOTAL:</b>		<b>26,728.91</b>	<b>2,138.32</b>	<b>0.00</b>	<b>26,728.91</b>	
08/2024		-317.46	-25.39	0.00	5,617.00	NEG MONEY AMOUNT DISALLOWED
08/2024		26,728.91	-213.83	0.00	26,728.91	NEG MONEY AMOUNT DISALLOWED
08/2024		0.00	0.00	0.00	0.00	PENDING RET/DROP/OPT5/DROP MBR
08/2024		-73.47	-5.87	0.00	5,633.00	NEG MONEY AMOUNT DISALLOWED
08/2024		-39.18	-3.13	0.00	9,013.00	NEG MONEY AMOUNT DISALLOWED
08/2024		-19.92	-1.59	0.00	4,583.00	NEG MONEY AMOUNT DISALLOWED
<b>TOTAL:</b>		<b>26,278.88</b>	<b>-249.81</b>	<b>0.00</b>	<b>51,574.91</b>	
09/2024		-6.22	-0.49	0.00	7,436.00	NEG MONEY AMOUNT DISALLOWED
09/2024		1,020.00	81.60	0.00	1,020.00	PENDING RET/DROP/OPT5/DROP MBR
09/2024		-33.33	480.00	0.00	3,000.00	NEG MONEY AMOUNT DISALLOWED
09/2024		-48.88	704.00	0.00	4,400.00	NEG MONEY AMOUNT DISALLOWED
<b>TOTAL:</b>		<b>921.57</b>	<b>1,265.11</b>	<b>0.00</b>	<b>15,856.00</b>	



# Salary rejections

Rejections remain on the report and do not fall off, even after correction.

## Salary Rejections

Month/Year	SSN	Actual Earnings	Sheltered Contributions	Unsheltered Contributions	FullTime Earnings	Error Message
07/2024		26,728.91	2,138.32	0.00	26,728.91	CONTRIBUTION AMT MUST BE 0
07/2024		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
	<b>TOTAL:</b>	<b>26,728.91</b>	<b>2,138.32</b>	<b>0.00</b>	<b>26,728.91</b>	
08/2024		-317.46	-25.39	0.00	5,617.00	NEG MONEY AMOUNT DISALLOWED
08/2024		26,728.91	-213.83	0.00	26,728.91	NEG MONEY AMOUNT DISALLOWED
08/2024		0.00	0.00	0.00	0.00	PENDING RET/DROP/OPT5/DROP MBR
08/2024		-73.47	-5.87	0.00	5,633.00	NEG MONEY AMOUNT DISALLOWED
08/2024		-39.18	-3.13	0.00	9,013.00	NEG MONEY AMOUNT DISALLOWED
08/2024		-19.92	-1.59	0.00	4,583.00	NEG MONEY AMOUNT DISALLOWED
	<b>TOTAL:</b>	<b>26,278.88</b>	<b>-249.81</b>	<b>0.00</b>	<b>51,574.91</b>	
09/2024		-6.22	-0.49	0.00	7,436.00	NEG MONEY AMOUNT DISALLOWED
09/2024		1,020.00	81.60	0.00	1,020.00	PENDING RET/DROP/OPT5/DROP MBR
09/2024		-33.33	480.00	0.00	3,000.00	NEG MONEY AMOUNT DISALLOWED
09/2024		-48.88	704.00	0.00	4,400.00	NEG MONEY AMOUNT DISALLOWED
	<b>TOTAL:</b>	<b>924.57</b>	<b>1,265.11</b>	<b>0.00</b>	<b>15,856.00</b>	

# 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
	<b>TOTAL:</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
09/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
	<b>TOTAL:</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	

# 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	Lo
Agency Certification (Form 11B)		
Annual Leave Update		
Contribution Correction		
Enrollments		
Full-Time Only Corrections		
Furlough Certification and Update		
Home Address Update		
Journal Entry Review		
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		

# Contribution Corrections (CCR)

Corrects salary reporting in the current fiscal year

- Add, edit/change, or delete monthly salary postings reported

## Contribution Correction

System: 4 SSN: Name:	Employer: Fiscal Year: <span style="border: 1px solid black; padding: 2px;">Current Fiscal Year</span> 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 Zeros' 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 Zeros' 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	
<a href="#">Edit</a>	2736.00	2736.00	218.88	30	<a href="#">Delete</a>



# Monthly Correction Journal Screen

Provides detailed list of all online contribution corrections made for any reporting period (MM/YYYY) of the fiscal year.

*May result in additional charges or credits to employer's account.*

**Monthly Correction Journal**  
For 10/ Year

System: 4	Fiscal Year: :	Employer:						
SSN	Type	Oper	Earnings	Contributions	Fulltime	Adjusted Earnings	Adjusted Contributions	Adjusted Fulltime
30	R		14,071.72	1,125.74	14,071.72	5,517.41	441.40	5,517.41
Posted on 11/16/2023 by EMPR								
30	R		9,323.98	745.92	9,323.98	5,671.10	453.69	5,671.10
Posted on 11/16/2023 by EMPR								
30	R		10,923.98	873.92	10,923.98	4,496.99	359.76	4,496.99
Posted on 11/16/2023 by EMPR								
Unsheltered Regular Totals			0.00	0.00	0.00	0.00	0.00	0.00
Sheltered Regular Totals			34,319.68	2,745.58	34,319.68	15,685.50	1,254.85	15,685.50

Employers	Reports
Employer Contribution Accounts Receivable	
Employer Contribution Charges	
Employer Payments	
Employer Contacts	
Journal Entry	
ORP Contribution Charges	
Monthly Correction Journal	



# Terminations

Enter a termination date for employee who:

- Resigns
- Changes to a non-covered position at your agency
- Is approved for TRSL disability retirement
- Is a RTW retiree who has not worked for more than 3-4 months with your agency

- Update within 30 days of the member's last day of work (or last day of official leave)
- Termination dates do not have to be the same for TRSL and insurance coverage
- Use MM/DD/YYYY format

Reminder: **Do not** enroll and term with the same date

**Terminations**

SSN: \_\_\_\_\_ Employer: \_\_\_\_\_  
Name: \_\_\_\_\_

**Procedures for using Terminations:**

1. Click 'Edit' in the first column to open the line for editing.
2. Enter the termination date and select the months of contract and click 'Update'.
3. Click 'Cancel' to undo changes entered or to return to the initial display.

	System	Employment Date	Termination
<a href="#">Edit</a>	4	12/17/2001	

**Updates** ▾ **Submit Files**

Agency Certification (Form 11B)

Annual Leave Update

Contribution Correction

Enrollments

Sick Leave Days Paid Update

Sick Leave Add and/or Update

**Terminations**

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# Index 6.0: Service Credit Certifications/Corrections

Provides instructions for identifying and correcting records requiring service credit certification

The information presented in this index describes the following:

- What is service credit?
- How to identify records requiring service credit certification
- How to certify service credit/certify questionable years

**Related terms and definitions**

Employers should be familiar with the following terms and definitions as it relates to TRSL service credit:

- **Actual earnings:** All earnings paid to a member meeting the definition of earnable compensation in accordance with [LSA R.S. 11:701\(10\)](#). (See "Earnable compensation" section of [Index 4.0](#) for more information and instructions.)
- **Full-time earnings:** The compensation that would be payable if the employee worked full-time for the entire reporting period plus any other earnings. For service credit purposes, the full-time earnings amount is the amount the member would have earned if they worked full-time for the entire year as a full-time employee. TRSL does not include part-time earnings.
- **Part-time for the purpose of earning service credit for eligibility purposes:** Employees are considered part-time for the purpose of earning service credit for eligibility purposes if they are not scheduled to work full-time for a full normal work week (i.e., scheduled to work full-time in a full normal day (100 percent effort). This definition of part-time service credit should not be confused with the definition of a part-time employee found in [Index 4.0](#).

For example, if the member works 6 hours per quarter (15 hours per semester) and is scheduled to work 12 hours per quarter (30 hours per semester), their percent effort is 50% (15 hours divided by 30 hours = 0.5).

For example, if the member works 6 hours per quarter (15 hours per semester) and is scheduled to work 12 hours per quarter (30 hours per semester), their percent effort is 50% (6 credit hours divided by 12 credit hours).

- **Percent effort for all other positions:** The percentage of a full day an employee is scheduled to work. For example, if someone is scheduled to work 5 hours per day and 7 hours is considered a full day, then their percent effort is 71% (5 hours divided by 7 hours = 0.71)
- **Questionable year:** A fiscal year whose service credit requires certification.

# 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

# Terms/definitions (cont'd)

## Service credit formula:

- $\text{Actual earnings} / \text{Full-time earnings} = \text{Service credit for benefit computation}$
- $\text{Service credit for benefit computation} / \% \text{ effort} = \text{Service credit for eligibility}$

## Percent (%) effort formula:

- $\# \text{ hours worked} / \# \text{ hours in a full workday}$

Example 1: Employee works 5 hours per day; normal full-time is 8 hours per day;

- Percent effort:  $5/8 \text{ hours} = 63\% \text{ effort}$

Example 2: Adjunct employee scheduled for Fall semester to teach 6 credit hours; normal full-time is 15 credit hours for Fall & Spring

- Percent effort:  $6/15 \text{ credit hours} = 40\% \text{ effort for Fall semester}$

# Retrieving Questionable Years Report

<b>Reports</b>	<b>Updates</b>	<b>Logo</b>
Active/Active DROP Member Service		
Agencies Without Charges		
Annual Leave		
Checklist Status		
Contribution Exception		
Employer Payments		
Employer Delinquent Contributions		
Employer Statements		
Enrolled Not Reported		
Ending DROP Participation		
Furloughed Employees Certification		
Insurance/Voluntary Deduction		
Members Eligible to Retire		
ORP Statements		
<b>Questionable Years</b>		
Questionable Year Statistics for All Fiscal Years		
Reporting Not Enrolled		
Sick Leave		
Sick Leave Errors		

<b>Query Record</b>
Employer ID <input type="text"/>
<b>Report Selection</b>
<input type="radio"/> retirement actions pending
<input type="radio"/> all outstanding questionable years
<input type="radio"/> fiscal years less than/equal to 3 years old
<input type="radio"/> fiscal years greater than 3 years old
<input type="radio"/> by fiscal year
<b>Sort Selection</b>
<input type="text" value="SSN"/>
<input type="text" value="fiscal year"/>
<input type="text" value="member status"/>
<input type="text" value="reason 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.

# Questionable Years Report

New records added after the close of each fiscal year (approx. August 1)

- Certify/correct each record within three years to avoid actuarial charges to your agency

This report contains all outstanding questionable years sorted by SSN.

**Current Count 345 as of 01/16/2025**  
**Original Count 3,696**

**Employer: Louisiana State University**  
**91% Complete**

**Description of Reason**  
 1 Annual salary is more than 5% decrease from previous year  
 2 1st year of employment for an employer / 1st year of employment after DROP  
 3 Changed employer / Terminated during the fiscal year  
 4 Partial year of service credit not previously certified  
 5 (P/T) Possible part-time employment (may receive additional eligibility credit)

**Note: Employers will be liable for service credit corrections after three years. Corrections resulting in an increase in the service credit will be an actuarial cost in accordance with Louisiana Revised Statute 11.888 C.**

**Please update/verify enrollment and/or termination date(s)**

Name	Sys	SSN	Fiscal Year	Status	Date of Employment	Date of Termination	Actual Earnings	Full-Time Earnings	Service Credit	Reason for Questioning Year
WF	4		2023	INACTIVE	05/26/2022	06/28/2024	21,103.31	29,107.91	0.73	4
HE	4		2024	INACTIVE	08/08/2023	05/13/2024	44,000.00	44,000.00	0.93	2,3,4
WII	4		2016	REFUNDED	01/14/2014	12/14/2015	29,350.00	29,350.00	0.48	1,3,4
BAC	4		2024	ACTIVE	08/09/2022		41,823.25	112,272.42	0.37	1,4



# How to certify questionable years

Three online processes:

- **Full-Time Only Corrections:** Use when incorrect full-time earnings reported or service credit is incorrect
- **Questionable Year Certification:** Use when service credit, actual earnings, and full-time earnings reported are correct and reasonable
- **Prior Year Salary Corrections:** Use when incorrect actual earnings reported



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



# Full-Time Only Corrections

Updates service credit

- Must provide correct Full-time Earnings amount
- Use Reason drop-down box or enter Comment

<b>Reason:</b>	Official Leave (Other than Sabbatical) Sabbatical at Reduced Pay Extra Earnings Workers' Compensation Summer School Earnings Full-Time Earnings Under/Over-stated Full-Time not previously reported 1st Year of Employment Last Year of Employment 1st Year of Employment After DROP Part-time Employee Substitute Earnings
<b>Comment:</b>	

## Full-Time Only Corrections

SSN: <input type="text"/>		Employer: <input type="text"/> BD	
Name: <input type="text"/>		Fiscal Year: 2017	
System: 4			

Contribution Type	Employer Indicator	Actual Earnings	Contribution Amount	Full Time Earnings	Service Credit	Comment
Sheltered	Primary	8,056.35	644.51	8,056.35	0.37	QUESTIONABLE YEAR

**Instructions for using Full-Time Only Corrections:**

- The information as reported to TRSL for the fiscal year is displayed above.
- Full-time earnings is the compensation that would be payable if the employee worked full-time for the full normal working period. Full-time earnings equal an employee's full-time base pay (regardless of whether or not this amount is actually paid) plus any additional payments made to the employee (i.e., PIP summer school, overtime, stipends, cash house allowances, coaching supplements, sales tax, bonuses and any other monies paid to a member over and above his or her base pay defined as earnable compensation by LSA-R.S. 11:701(10)). **Full-time earnings for part-time employees is the same as full-time employees. Full-time earnings must be equal to or greater than actual earnings.**
- If the fiscal year you are correcting has service credit LESS THAN 1.00 and the service credit should be 1.00, because the member's actual and full-time amounts are correct and are the same, you MUST enter the SAME full-time earnings, which will divide actual by full-time and update that fiscal year to 1.00.**
- If the fiscal year has service credit of 1.00 and you enter the same full-time earnings that is already on the database, you will receive an error "New full-time is equal to reported. Enter a corrected full-time amount." This process will also mark the year with asteriks as CERTIFIED.**
- Select a reason for the correction.
- A comment can be added for additional information needed to clarify the correction. The comment is optional unless a reason is not chosen in which case the comment is required.
- Click the 'Submit' button to submit the correction.
- NOTE: The correction of an authorized signer's personal TRSL member account must be completed by another authorized signer at the agency.**

Full-Time Earnings:

Reason:

Comment:

# EXAMPLE: Full-Time Only Correction

Record appears on the [Questionable Years \(QY\) report](#)

EXAMPLE: New hire as of 10/01/2020

- [Ensure](#) Actual Earnings reported are correct
- Need correct [Full-time earnings \(FTE\)](#) to clear the questionable year record

## Questionable year reason codes

1. Annual earnings decreased more than 5% from previous year
2. 1<sup>st</sup> year of employment for an employer / 1<sup>st</sup> year of employment after DROP
3. Changed employers during the fiscal year and/or break in service
4. Partial year of service credit not previously certified

Name	Sys	SSN	Fiscal Year	Status	Date of Employment	Date of Termination	Actual Earnings	Full-Time Earnings	Service Credit	Reason for Questioning Year
DOE JOHN	4		2021	ACTIVE	10/01/2020		38,898.03	39,125.38	0.77	2,4

**Tip:** *Never rely on Full-time earnings appearing on QY report or TRSL EMIS Screens. Always research correct FTE.*

# EXAMPLE: Full-Time Only Correction

### Full-Time Only Corrections

SSN: Name: System: 4		✓	Employer: Fiscal Year: 2021		✗	
Contribution Type	Employer Indicator	Actual Earnings	Contribution Amount	Full Time Earnings	Service Credit	Comment
Sheltered	Primary	38,898.03	3,111.82	39,125.38	0.77	QUESTIONABLE YEAR

**Instructions for using Full-Time Only Corrections:**

- The information as reported to TRSL for the fiscal year is displayed above.
- Full-time earnings is the compensation that would be payable if the employee worked full-time for the full normal working period. Full-time earnings equal an employee's full-time base pay (regardless of whether or not this amount is actually paid) plus any additional payments made to the employee (i.e., PIP summer school, overtime, stipends, cash house allowances, coaching supplements, sales tax, bonuses and any other monies paid to a member over and above his or her base pay defined as earnable compensation by LSA-R.S. 11:701(10)). **Full-time earnings for part-time employees is the same as full-time employees. Full-time earnings must be equal to or greater than actual earnings.**
- If the fiscal year you are correcting has service credit LESS THAN 1.00 and the service credit should be 1.00, because the member's actual and full-time amounts are correct and are the same, you MUST enter the SAME full-time earnings, which will divide actual by full-time and update that fiscal year to 1.00.
- If the fiscal year has service credit of 1.00 and you enter the same full-time earnings that is already on the database, you will receive an error "New full-time is equal to reported. Enter a corrected full-time amount." This process will also mark the year with asteriks as CERTIFIED.
- Select a reason for the correction.
- A comment can be added for additional information needed to clarify the correction. A comment is optional unless a reason is not chosen in which case the comment is required.
- Click the 'Submit' button to submit the correction.
- NOTE: The correction of an authorized signer's personal TRSL membership requires the correction to be made by another authorized signer at the agency.

Provide total salary employee would have made if he worked entire year as a full-time employee + any add'l pay (Stipends, tax supplement, etc.)

Full-Time Earnings:

Reason:

Comment:

Use Reason drop-down field when possible.  
EXCEPTION: Use Comment field to note anything unusual (LWOP, dockages, incorr hire date etc.) or none of Reason drop-down choices apply

# Actuarial Cost for Full-Time Only Corrections

LSA-R.S. 11:888 and LSA-R.S. 11:158 allow for an actuarial cost to the employer on corrections for fiscal years greater than three (3) years old that result in an increase in service credit.

- Journal Entry invoice for total Full-Time Only Corrections charges calculated after end of each fiscal year.
- Full-Time Only Corrections actuarial costs for members with a **retirement application on file** (other than entering DROP) charged to employers' account shortly after finalizing members' retirement benefit.

**The three-year timeline for certifying/correcting questionable years is calculated as follows:**

Current Fiscal Year:	FY 2025
Fiscal Year 1:	FY 2024
Fiscal Year 2:	FY 2023
Fiscal Year 3:	FY 2022
Older than three years:	FY 2021 & all fiscal years prior

# Questionable Year Certification

Does not update service credit; certifies reported data is correct as is

- Must select Reason from drop-down box or enter Comment
- **If applicable**, you must select “Part-time Employee” from the “Reason” drop-down list and enter the percent effort in the comment field for member to receive correct service credit for eligibility

<b>Reason:</b>	Previously reported information certified
<b>Comment:</b>	1st year of employment after DROP
	1st year of employment
	Last year of employment
	Official leave (other than sabbatical)
	Sabbatical at reduced pay
	Extra earnings
	Workers' compensation
	Summer school earnings
	Part-time employee
	Substitute earnings only

### Questionable Year Certification

SSN:       Employer:  A BD  
 Name:       Fiscal Year: 2016  
 System: 4

Contribution Type	Employer Indicator	Actual Earnings	Contribution Amount	Full Time Earnings	Service Credit	Comment
Sheltered	Primary	55,468.24	4,437.44	55,468.24	1.00	QUESTIONABLE YEAR

**Instructions for using Questionable Year Certification:**

1. The information as reported to TRSL for the fiscal year is displayed above.
2. This certification will only update the record with asterisks to certify the data reported is correct. IT WILL NOT CHANGE SERVICE CREDIT. The FULL-TIME ONLY CORRECTIONS must be used if service credit should be updated.
3. Select a reason for the certification.
4. A comment can be added for additional information needed to clarify the certification. The comment is optional unless a reason is not chosen in which case the comment is required.
5. Click the 'Certify' button to submit the certification.
6. NOTE: The certification of an authorized signer's personal TRSL member account must be completed by another authorized signer at the agency.

Reason:

Comment:

# EXAMPLE: Questionable Year Certification

Record appears on the Questionable Years report

- **Example:** New hire as of 08/06/2020; need certification for 1st year of employment (FY 2021)
- Per employer's research, employee has worked the entire year and had no dockages or leave without pay (LWOP) during FY 2021; Both Actual Earnings and Full-time earnings previously reported are correct.

## Questionable year reason codes

1. Annual earnings decreased more than 5% from previous year
2. 1<sup>st</sup> year of employment for an employer / 1st year of employment after DROP
3. Changed employers during the fiscal year and/or break in service
4. Partial year of service credit not previously certified

Name	Sys	SSN	Fiscal Year	Status	Date of Employment	Date of Termination	Actual Earnings	Full-Time Earnings	Service Credit	Reason for Questioning Year
DOE JANE	4			ACTIVE	08/06/		58,406.14	58,406.14	1.00	2



# EXAMPLE: Questionable Year Certification

## Questionable Year Certification

SSN: Name: System: 4	Employer: Fiscal Year:
----------------------------	---------------------------

Contribution Type	Employer Indicator	Actual Earnings	Contribution Amount	Full Time Earnings	Service Credit	Comment
Sheltered	Primary	58,406.14	4,672.49	58,406.14	1.00	QUESTIONABLE YEAR

### Instructions for using Questionable Year Certification:

1. The information as reported to TRSL for the fiscal year is displayed above.
2. This certification will only update the record with asterisks to certify the data reported is correct. IT WILL NOT CHANGE SERVICE CREDIT. The FULL-TIME ONLY CORRECTIONS must be used if service credit should be updated.
3. Select a reason for the certification.
4. A comment can be added for additional information needed to clarify the certification. The comment is optional unless a reason is not chosen in which case the comment is required.
5. Click the 'Certify' button to submit the certification.
6. NOTE: The certification of an authorized signer's personal TRSL member account must be completed by another authorized signer at the agency.

Reason:

Comment:

Use Reason drop-down field when possible

Certify



# Prior Year Salary Corrections

Updates service credit

- Must enter both correct actual earnings and full-time earnings amounts
- Must use reason drop-down box and/or comment field for both Salary Correction Comment and Salary Correction Full-Time Comment

**Prior Year Salary Corrections**

SSN: <input type="text"/>		Employer ID: <input type="text"/> BD	
Name: <input type="text"/> R		Fiscal Year: 2017	
System: 4			

Contribution Type	Employer Indicator	Actual Earnings	Contribution Amount	Full Time Earnings	Service Credit	Comment
Sheltered	Primary	11,878.92	950.32	12,098.12	0.32	QUESTIONABLE YEAR

**Instructions for using Prior Year Salary Corrections:**

1. Enter the actual earnings and full-time earnings and click "Submit" if replacing Sheltered data that has been posted for the year.
2. Click "Delete Posting" to delete the Sheltered posting for the year.
3. Click "Add Unsheltered" to open the Unsheltered line for editing. Enter the combined full-time earnings on the Sheltered line.
4. If you do not want to change posted Sheltered values when adding Unsheltered, leave the Sheltered actual earnings box empty.

Sheltered:     Delete Posting

Add Unsheltered:

**Instructions for using 100% Switch:**

1. To execute a 100% contribution type switch from Sheltered to Unsheltered, click the "100% Switch" box only.

100% Switch

**Salary Correction Comment**

**Instructions for using Salary Comment:**

1. Select a reason for the correction.
2. A comment can be added for additional information needed to clarify the correction. The comment is optional unless a reason is not chosen in which case the comment is required.

Reason:

**Comment:**  Nov sales tax not reported

**Salary Correction Full-Time**

**Instructions for using Full-Time Comment:**

1. Required for Primary when the Full-Time is different.
2. Select a reason for the full-time change.
3. A comment can be added for additional information needed to clarify the change. The comment is optional unless a reason is not chosen in which case the comment is required.

Reason:

**Comment:**  Worked 9/21/2016-1/2/2017; 9 Mon EE x

# Actuarial Cost/Charges for Prior Year Salary Corrections

If prior year correction increases earnings/contributions :

For fiscal years **three years old or less:**

- employer will be charged member & employer contributions plus interest rate at the judicial rate.

For fiscal years **more than three (3) years old:**

- Employer will be charged the greater of the actuarial cost of the increase or the member and employer contributions plus interest at the actuarial rate
  - **\$200 fee required**
  - Separate Journal Entry invoice for actuarial charge

## The three-year timeline for Prior Year Corrections:


Current Fiscal Year:	FY 2025
Fiscal Year 1:	FY 2024
Fiscal Year 2:	FY 2023
Fiscal Year 3:	FY 2022
Older than three years:	FY 2021 & all fiscal years prior

# Certifying traditional adjunct employment - SPECIAL CONDITIONS

Use TRSL's Adjunct Certification letter for adjunct employees employed by credit hour contracts

- Ensure eligibility each semester before certifying

*Assigned Retirement Analyst Liaison will provide instructions to update online in EMIS*

 Teachers' Retirement System of Louisiana

www.trsl.org  
225.925.6446  
225.925.4779  
web.master@trsl.org  
Post Office Box 94123  
Baton Rouge LA 70804-9123

03-6

**SERVICE CREDIT CERTIFICATION – ADJUNCT**

UNIVERSITY  
MS. ( )

LA 300

Re:  
SSN:

The fiscal year listed below is being questioned for possible adjunct earnings. Please certify the following information:

Fiscal Year:	Number of Credit Hours or Classes taught per semester	Number of Credit Hours or Classes considered Full-Time	Actual Earnings for each Semester	Did member work the entire semester? (circle one)	If No, indicate Amount member would have earned if worked entire semester	Explanation for other earnings (i.e. additional compensation, overloads, grants, etc)
July/Aug Summer Semester			\$	Yes / No	\$	
Fall Semester			\$	Yes / No	\$	
Spring Semester			\$	Yes / No	\$	
June Summer Semester			\$	Yes / No	\$	

Please verify the membership eligibility before certifying anyone working less than 20 hours per week or less than 50% of what is considered full-time. Please see Index 2.0 of the Employer Procedures Manual located on the TRSL website ([http://www.trsl.org/main/employers/procedures\\_manual](http://www.trsl.org/main/employers/procedures_manual)). If you determine the member is not eligible, please submit a Prior Year Correction to remove any ineligible earnings. If member was contracted to work more than 20 hours per week or at 50%, but worked less due to class cancellation due to lack of enrollment or other reason: please document in comments below or contact your agency's **assigned TRSL Retirement Liaison** for assistance.

# Certifying hourly adjuncts - SPECIAL CONDITIONS

Typically requires a Full-time Only Correction

## 1. Verify hourly employee's enrollment eligibility

- Must work more than 20 hours per week OR
- Meets **Ten (10) year rule** for service credit for eligibility

## 2. Calculate Full-time Earnings amount

*Hourly rate x total hours of contract for a year*

*Examples:*

- 9 months: 1,440 hours x hourly rate
- 12 months: 2,080 hours x hourly rate

# Certifying hourly adjuncts (cont.) - SPECIAL CONDITIONS

## Typically requires a Full-time Only Correction

**3. Reason:** If worked a set schedule then select “Part-time Employee” as the reason. If worked as needed with no set schedule then skip reason.

**4. Enter comment:** Hourly employee @ XX/hr, sched to work at least XX hours per week.

- Document employees contracted to work more than 20 hours per week or at 50%

Full-time Only Corrections program

Full-Time Earnings:  Enter Full-time Amount

Reason:  Select "Part-time Employee"

Comment:  Enter Comment



CONTENTS

- Sick leave
- Certification
- Sick leave update
- Direct deposit
- File transfer (FTP)
- Summer percent change
- Reporting
- Member sick leave
- Member accrual
- Reports
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CONTENTS

- Service/ILSB retirement
- Deferred Retirement Option Plan (DROPT)
- Entering DROPT (DROPT In)
- Exiting DROPT (DROPT Out)
- Participation Report
- After DROPT (DROPT Out)
- RTW coverage
- Termination of Employment at End of DROPT Participation/ Employment (Form 11H)
- Application for RTW Supplement (Form 11RTW)
- Employer request letters
- Agency Cert. (Form 11B)

Whenever a TRSL-covered employee retires or enters DROPT (Deferred Retirement Option Plan), TRSL will request the applicable employer(s) certify specific information in a timely manner so that we are able to accurately calculate the retirement benefits and promptly begin paying those benefits to the retiree.

This index provides employer information and instructions if a TRSL-covered employee submits an application for retirement or DROPT.

Service/ILSB Retirement

Whenever a member who is eligible to retire or wishes to apply for Service Retirement, Initial Lump Sum Benefit (ILSB), or DROPT, the member must submit a completed *Application for Service Retirement, ILSB, or DROPT* (Form 11) or apply online through Member Access no earlier than six months before the date of retirement. Both the member and employer should be certain that the member is eligible for retirement or DROPT by the time the member submits an application for retirement or DROPT, or terminating employment.

Details on retirement eligibility, member application, and member documentation requirements are discussed in the TRSL Member Handbook: *Application for Service Retirement, ILSB, or DROPT* (Form 11) and *Application for RTW Supplement* (Form 11RTW). For more information, see the *TRSL Handbook: A Guide to the Deferred Retirement Option Plan*, *Initial Lump Sum Benefit (ILSB)*, and *RTW Supplement*.

Deferred Retirement Option Plan (DROPT)

When a member participates in DROPT, his employment continues. During the member's DROPT participation period, neither employer or employee contributions are remitted to TRSL.

Details on DROPT eligibility, how the program works, as well as member application & documentation requirements are discussed in our *DROPT Handbook: A guide to the Deferred Retirement Option Plan* publication.

Entering DROPT (DROPT In)

Each member who is eligible and wishes to participate in DROPT must submit a completed *Application for Service Retirement, ILSB, or DROPT* (Form 11) or apply online through Member Access no earlier than six months before the DROPT start date. Both the member and employer

Frequently asked questions

RELATED FORMS

- Application for Service Retirement, ILSB, or DROPT* (Form 11)
- Termination of Employment at End of DROPT Participation/ Employment* (Form 11H)
- Application for RTW Supplement* (Form 11RTW)

# Retirement Process/Issues Index 11.0: Retirement/DROPT processing & Index 17.0: Leave Information

Provides information related to the retirement process



# Employer certifications: Retirement/DROP processing

The following data is needed for each TRSL-covered employee who applies for retirement or DROP:

- Certify all questionable years
- Certify sick leave days used for all fiscal years of employment and sick leave days paid at retirement
- Complete Agency Certification after termination date and after all earnings & contributions are reported to TRSL

Updates	Submit Files	Log
Agency Certification (Form 11B)		
Annual Leave Update		
Contribution Correction		
Enrollments		
Full-Time Only Corrections		
Furlough Certification and Update		
Home Address Update		
ORP Salary Entry (up to 25 employees only)		
Prior Year Salary Corrections		
Questionable Year Certification		
Retiree Voluntary/Insurance Deduction		
Salary Contribution Entry (up to 25 employees only)		
Sick Leave Days Paid Update		
Sick Leave Add and/or Update		
Terminations		

*\*Must have access rights designated on Form 1 to submit information*



# Request letters

Identify member, date of retirement (or DROP begin date), and information TRSL still needs from the employer.

- **First Request** (sent on or near the member's retirement date)
- **Second Request** (sent approximately 45 days after the 1st Request)
- **Final Request** (Sent approximately 30 days after 2nd Request; employer has 15 calendar days to complete)

The image shows three overlapping copies of a request letter from the Teachers' Retirement System of Louisiana (TRSL) to an employer. The letters are dated June 2, 2021, July 6, 2021, and August 16, 2021. Each letter contains the following information:

- Header:** TRSL logo and contact information (www.trsl.org, 225-925-5445, 225-925-4779, web.trsl.org, PO Box 3412, Baton Rouge, LA 70801).
- Date:** June 2, 2021; July 6, 2021; August 16, 2021.
- Member Information:** MRS. [REDACTED] PARISH SCHOOL SYSTEM, PO BOX [REDACTED], LA 70[REDACTED].
- Request Type:** 1st Request, 2nd Request, and Final Request (highlighted with red boxes).
- Member Details:** Member: [REDACTED], SSN: [REDACTED], Date of Retirement: 05/22/2021.
- Employer Information:** Dear Employer.
- Instructions:** Additional information is needed to continue processing this member's Termination of Employment (Form 11H). Please provide the items listed below after the member's last day of work. All items can be updated online after logging into TRSL's Employer/Membership Information Site.
- Drop Dates:** DROP Dates: 1/1/2017 through 3/31/2020.
- Drop Out Stamp:** A large "DROP Out" stamp is visible on the right side of the letters.
- Footer:** Retirement Department, Teachers' Retirement System of Louisiana.

# Agency Certification (Form 11B)

Certifies member's termination date and service credit for the current fiscal year

- Requested when a TRSL member retires or enters DROP
- Termination date\* = last day worked or last day of official leave
- Full-time earnings = amount the employee would have earned for working the entire year as a full-time employee

Available under Updates menu

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

\*Effective date of retirement will be day after termination date OR date retirement/DROP application is received, whichever is later

**Updates**

- Agency Certification (Form 11B)
- Annual Leave Update
- Contribution Correction

Agency Certification (Form 11B)

Instructions: The employer must submit this information for a member of the Teachers' Retirement System of Louisiana (TRSL) who (1) enters DROP, (2) retires or (3) dies. The most recent employer(s) may not certify this information until after the last day for which the member will receive pay. Certification for members electing to participate in the Deferred Retirement Option Plan (DROP) may not be submitted until after the beginning date of the DROP participation. A second certification is required when the DROP participant ultimately terminates employment, which is referred to as DROP Out. Date of termination should be the last day of work or last day of leave. Salary information should reflect actual earnings and contributions for the current fiscal year through the date of termination or the day before DROP participation, if applicable. Certification of regular earnings should be for dates earned during the current fiscal year and must agree with the Contribution Reports submitted by the employer payroll department. The monthly Contributions Reports are the official reports of member earnings as provided by LSA-R.S. 11:888.

**Member Information**

Member name \_\_\_\_\_ Social Security number \_\_\_\_\_

Employer \_\_\_\_\_

**Current Year Information (July 1 - June 30) - Complete for all retirements, DROP and deaths**

Date of termination - See Instructions \_\_\_\_\_

Full-time earnings the member would have earned working the full year at 100% effort plus any additional pay received. Refer to the Employer Procedures Manual, Index 4.1, for more information. Do not include rollover earnings in the full-time earnings. Full-time earnings \$ \_\_\_\_\_

Rollover earnings earned in June (prior year), paid in July - amount of salary that is earned in June that would normally be paid in July. Rollover earnings \$ \_\_\_\_\_

Percent of effort (if part-time) - percent of time part-time member works. For example, the member works 4 hours out of an 8-hour day, 5 days a week, the percent effort would be 50%. Percent effort \_\_\_\_\_ %

Comment \_\_\_\_\_

**Electronic Signature**

I understand that by submitting this agency certification online that I am certifying the actual earnings and contributions posted on the member's account are correct for the year certified and I agree to conduct this transaction by electronic means and that I am signing this certification.

Submit

# Agency Certification (Form 11B): Retiring after DROP section

Required if member works more than two years after DROP

Information required:

- Member's last full fiscal year in DROP
- Actual earnings for member's last full fiscal year in DROP
- Full-time earnings amount for member's last full fiscal year in DROP

Retiring After DROP	
Fiscal year - last fiscal year the member was in DROP and paid no retirement contributions due to DROP participation.	Fiscal year <input type="text"/>
Actual earnings - earnings (including PIP earnings) the DROP participant earned during the last 12 months of DROP by fiscal year. This information is needed to test the 10% cap for members who worked at least 36 months after DROP.	Actual earnings \$ <input type="text"/>
Full-time earnings - earnings the DROP participant would have earned working the full year at 100% effort.	Full-time earnings \$ <input type="text"/>

**Agency Certification (Form 11B)**

Instructions: The employer must submit this information for a member of the Teachers' Retirement System of Louisiana (TRSL) who (1) enters DROP, (2) retires or (3) dies. The most recent employer(s) may not certify this information until after the last day for which the member will receive pay. Certification for members electing to participate in the Deferred Retirement Option Plan (DROP) may not be submitted until after the beginning date of the DROP participation. A second certification is required when the DROP participant ultimately terminates employment, which is referred to as DROP Out. Date of termination should be the last day of work or last day of leave. Salary information should reflect actual earnings and contributions for the current fiscal year through the date of termination or the day before DROP participation, if applicable. Certification of regular earnings should be for dates earned during the current fiscal year and must agree with the Contribution Reports submitted by the employer payroll department. The monthly Contributions Reports are the official reports of member earnings as provided by LSA-R.S. 11:888.

Member Information	
Member name	Social Security number
Employer	
Current Year Information (July 1 - June 30) - Complete for all retirements, DROP and deaths	
Date of termination - See Instructions	Enter date in mm/dd/yyyy format. <input type="text"/>
Full-time earnings the member would have earned working the full year at 100% effort plus any additional pay received. Refer to the Employer Procedures Manual, Index 4.1, for more information. Do not include rollover earnings in the full-time earnings.	Full-time earnings \$ <input type="text"/>
Rollover earnings earned in June (prior year), paid in July - amount of salary that is earned in June that would normally be paid in July.	Rollover earnings \$ <input type="text"/>
Percent of effort (if part-time) - percent of time part-time member works. For example, the member works 4 hours out of an 8-hour day, 5 days a week, the percent effort would be 50%.	Percent effort <input type="text"/> %
Comment <input type="text"/>	
Retiring After DROP	
Fiscal year - last fiscal year the member was in DROP and paid no retirement contributions due to DROP participation.	Fiscal year <input type="text"/>
Actual earnings - earnings (including PIP earnings) the DROP participant earned during the last 12 months of DROP by fiscal year. This information is needed to test the 10% cap for members who worked at least 36 months after DROP.	Actual earnings \$ <input type="text"/>
Full-time earnings - earnings the DROP participant would have earned working the full year at 100% effort.	Full-time earnings \$ <input type="text"/>

# Termination date vs. retirement date

Termination date cannot be the same as the retirement date.

## **TERMINATION DATE**

Member's last day of work **or** last day of official leave

## **RETIREMENT DATE**

Day after termination date **or** the date TRSL receives completed retirement application (whichever is later)

# 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 11RTW** and the employer has entered an **online termination date** after retiree's last day of work.

<b>HOW TO SUBMIT:</b>	<b>DROP OFF or MAIL IN</b>	<b>EMAIL</b>	<b>FAX</b>	<b>TRSL USE ONLY</b>
	8401 United Plaza Blvd, Ste 300 Baton Rouge LA 70809	web.master@trsl.org	(225) 925-6366	

**Print in blue or black ink or type all entries except signatures.** Complete Sections 1-5 of this form. If you are continuing employment after returning to work, you do not need to complete this form until you are ready to terminate employment. Your application may be canceled prior to receiving your first RTW Supplemental Benefit. Contact TRSL immediately if you intend to cancel your application.

**Section 1 - Member information**

Name: Last, first, MI, suffix (r., II, etc.)	Social Security number (###-##-####)
Address: Street / PO box	City, state, zip
Daytime telephone (include area code)	Email address
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Re-married <input type="checkbox"/> Legally separated <input type="checkbox"/> Widowed	Has your marital status changed since returning to work? <input type="checkbox"/> Yes <input type="checkbox"/> No
Name of current or last employer	Job title

**Section 2 - Employment termination**

Last day of work (mm/dd/yyyy) \_\_\_\_\_ Your supplemental benefit will be effective 90 days after this date.

**Section 3 - Direct deposit**

**DIRECT DEPOSIT** (If TRSL doesn't receive a new Form 15D before your benefit resumes, your previous bank information will be used.)  
 Use Form 15D already on file with TRSL  I will submit a NEW Form 15D

**Section 4 - Federal tax information**

**TAX WITHHOLDING** (If TRSL doesn't receive a new Form W-4P before your benefit resumes, the most recent tax withholding on file with TRSL will be used. If you would like to update your withholding, please complete a new Form W-4P, which is available at [www.trsl.org](http://www.trsl.org), and submit it to us.)  
 Use Form W-4P already on file with TRSL  I will submit a NEW Form W-4P

**Section 5 - Member signature**

I hereby make application for retirement in accordance with Louisiana laws. I have carefully read the instructions and made the appropriate date of termination designation in Section 2. I understand that I should receive an acknowledgment letter by mail approximately two weeks after the date TRSL receives my application. If I do not receive an acknowledgment letter, I will contact TRSL.

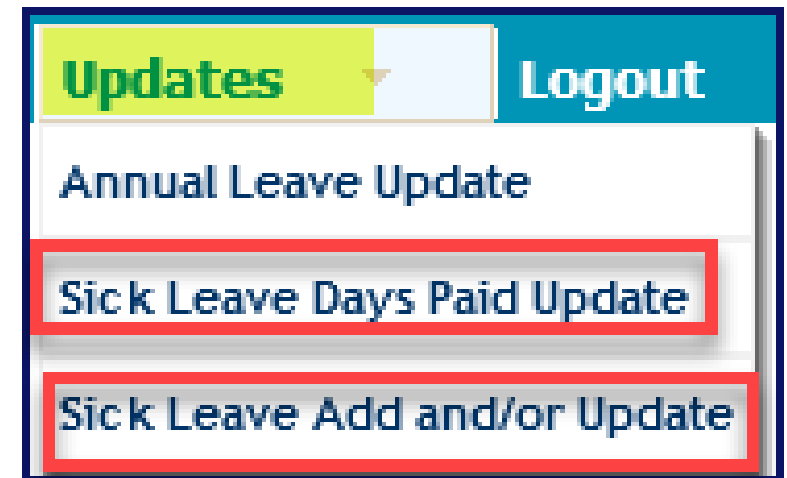
Member's signature (DO NOT PRINT OR TYPE)	Date signed (mm/dd/yyyy)
▶	

Supplemental benefit is not effective until **90 days** after the retiree's last day of work.

# 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)*





# 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)

**Sick Leave Add and/or Update**

SSN: \_\_\_\_\_ System: 4  
 Name: \_\_\_\_\_ Employer: \_\_\_\_\_

**Procedures for using Sick Leave Add and/or Update:**  
 1. Click 'Edit' or 'Add' in the first column to open the line for editing.  
 2. Enter the appropriate data and click 'Update'.  
 3. Click 'Cancel' to undo changes entered or to return to the initial display.  
 4. Click 'Delete' to remove data permanently.

NOTE: The certification of an authorized signer's personal TRSL member account must be completed by another authorized signer at the agency.

	Fiscal Year Ending	Months of Contract	Days Used	Summer School Days Worked	Summer School % Effort	Eligibility Indicator	Data Unavailable	Error Code	
<a href="#">Edit</a>	1999	12	14.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2000	09	5.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2001	09	4.50	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2002	09	4.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2003	09	6.50	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2004	09	4.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2005	09	2.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2006	09	12.50	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2007	09	6.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2008	09	22.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2009	09	11.00	0.00	0	Y			<a href="#">Delete</a>
<a href="#">Edit</a>	2010	09	5.50	0.00	0	Y			<a href="#">Delete</a>

**Updates** **Logout**

Annual Leave Update

Sick Leave Days Paid Update

**Sick Leave Add and/or Update**



# 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

The screenshot shows the 'Query Record' form in EMIS. The form has a dark blue background with white text. At the top, it says 'Query Record'. Below that, there are fields for 'System' (with the value '4') and 'SSN'. A red circle highlights the 'Use Employment History' checkbox, which is currently checked. Below this, there are two sections for 'Enter employment dates'. The first section has a checked checkbox and the second has an unchecked checkbox. Both sections have 'Beginning Date (mm/dd/yyyy)' and 'Ending Date (mm/dd/yyyy)' fields. Below these is an 'Optional' section for 'Select months of contract for adding records' with a dropdown menu. At the bottom, there are radio buttons for 'Display Records' with options 'All', 'Adds only', and 'Updates only'. There are 'Select' and 'Clear' buttons at the very bottom.

# 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*
<b>25</b>	Summer percent effort (050 for 50%)	Numeric	3
<b>28</b>	Summer days worked	Numeric	5*
<b>TOTAL 32 bytes (characters)</b>			

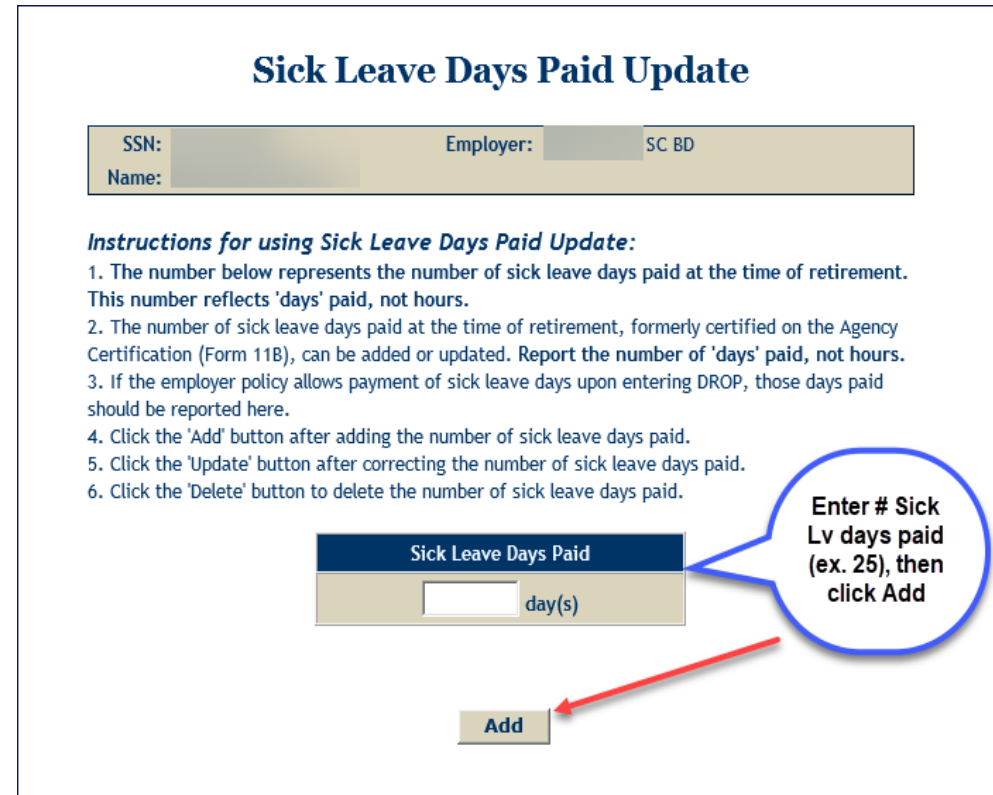
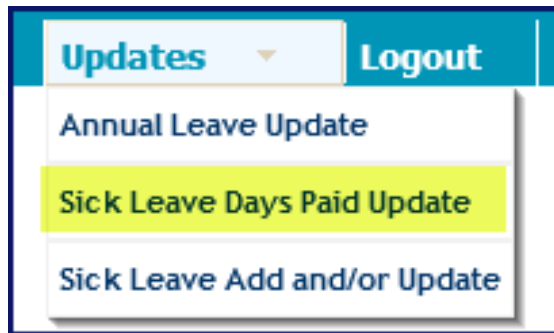


**Tip:** Check *Sick Leave Summary Report* for sick leave records rejected from the uploaded sick leave data file.

# 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



**Sick Leave Days Paid Update**

SSN: \_\_\_\_\_ Employer: SC BD  
Name: \_\_\_\_\_

**Instructions for using Sick Leave Days Paid Update:**

1. The number below represents the number of sick leave days paid at the time of retirement. This number reflects 'days' paid, not hours.
2. The number of sick leave days paid at the time of retirement, formerly certified on the Agency Certification (Form 11B), can be added or updated. Report the number of 'days' paid, not hours.
3. If the employer policy allows payment of sick leave days upon entering DROP, those days paid should be reported here.
4. Click the 'Add' button after adding the number of sick leave days paid.
5. Click the 'Update' button after correcting the number of sick leave days paid.
6. Click the 'Delete' button to delete the number of sick leave days paid.

Sick Leave Days Paid  
 day(s)

**Add**

Enter # Sick Lv days paid (ex. 25), then click Add

# EMIS sick/annual leave summary screen

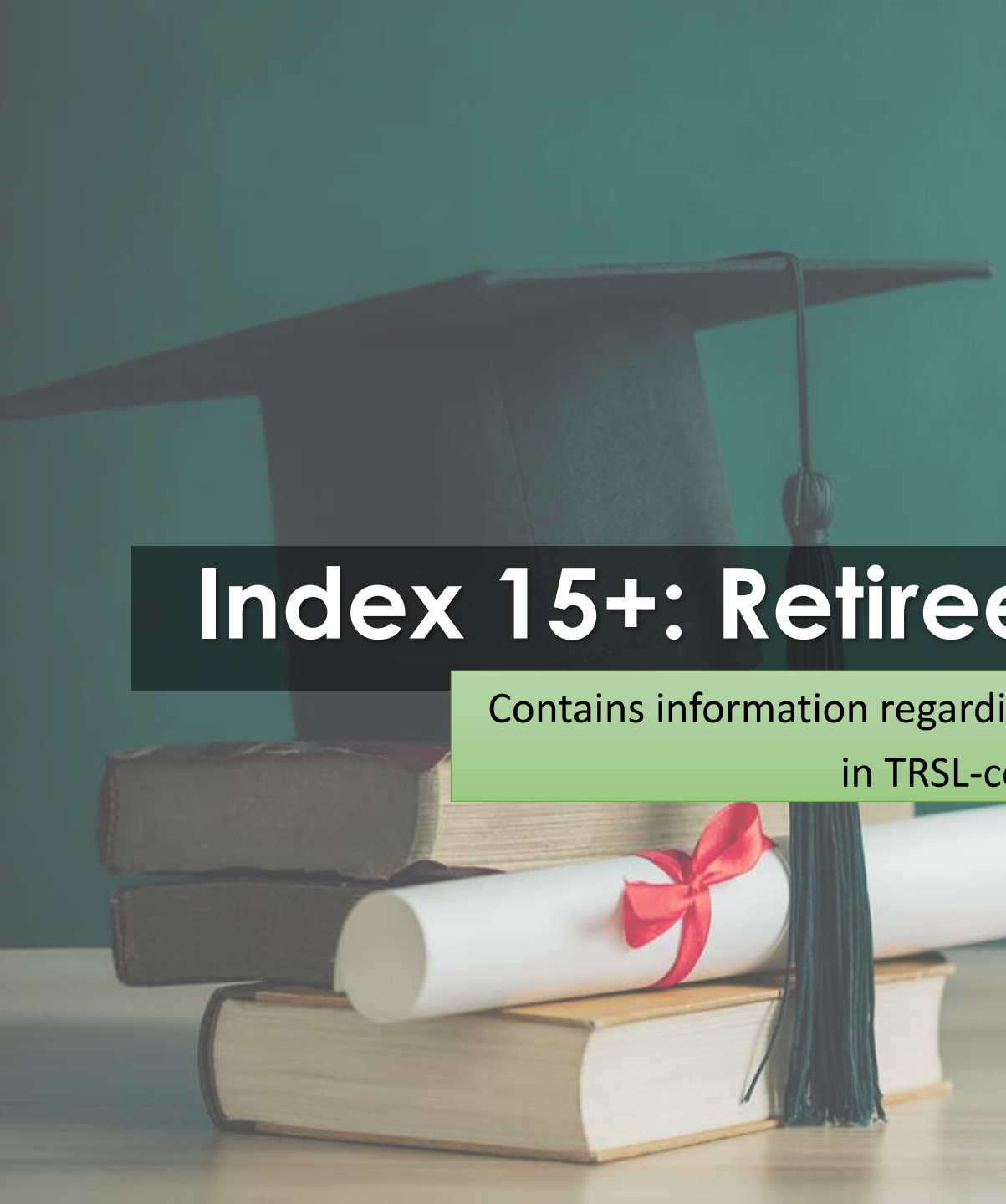
Confirms leave data already updated by employer(s)

Example		Sick Leave							
SSN: .		Name:							
Fiscal Year	Employer ID	Months of Contract	Days Used	Eligibility	Last Updated By	Transaction Date	Summer Days Worked	Summer Percent Effort	
2014	00	12	1.00		EMPLOYER-FILE	07/10/2014			
2015	00	12	0.00			03/30/2017			
2016	00	12	0.00			07/13/2021			
2017	00	12	2.50		EMPLOYER-FILE	11/13/2017			
2018	00	12	1.75		EMPLOYER-FILE	07/10/2018			
2019	00	12	18.25		EMPLOYER-FILE	07/08/2019			
2020	00	12	5.50		EMPLOYER-FILE	07/21/2020			
2021	00	12	45.00		EMPLOYER-FILE	11/01/2021			
		<b>Total:</b>	<b>166.50</b>	<i>days used 07/01/1990 and forward.</i>					

Sick Leave Days Paid			
Days Paid	Employer ID	Last Updated By	Transaction Date
25.00			07/13/2021

Members	Employers
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	
<b>Sick Leave/Annual Leave</b>	
DROP/ILSB Summary/History	



# Index 15+: Retirees Returning to Work

Contains information regarding the employment of TRSL retirees in TRSL-covered positions

**TRSL EMPLOYER MANUAL** INDEX 15.0  
INDEX 15.0: Retirees Returning to Work — OVERVIEW September 2022

The employment of a TRSL retiree into a TRSL-covered position is the decision of each employing agency. If you decide to proceed with hiring a retiree, La. R.S. 11:710, La. R.S. 11:710.1, and La. R.S. 11:710.2 govern the reemployment of TRSL retirees with respect to the impact on the retiree's benefit and whether retirement contributions will be paid.

Indices 15.1, 15.2, and 15.3 will provide additional information specific to each RTW group, including guidance regarding the enrollment of retirees.

2010 RTW Group	Index 15.1
Retirees meeting the criteria listed at right are in the 2010 RTW Group. (La. R.S. 11:710)	<ul style="list-style-type: none"><li>Retirees who retired before July 1, 2020, and have not made an irrevocable election to join the 2020 RTW Group</li></ul>
2020 RTW Group	Index 15.2
Retirees meeting either of the criteria listed at right are in the 2020 RTW Group. (La. R.S. 11:710.1)	<ul style="list-style-type: none"><li>Retirees who retired on or after July 1, 2020</li><li>Retirees who do not meet criteria for the 2010 RTW Group, but who make an irrevocable election to transfer to the 2020 RTW Group</li></ul>

**Enrollments**

The return-to-work (RTW) laws require employers to notify TRSL of all retirees returning to work in TRSL-covered positions within 30 days of such reemployment.

If an employer fails to enroll a reemployed retiree within 30 days of reemployment, and a retiree receives benefits which would have been suspended had the enrollment occurred timely, the return-to-work law provides that the employer shall be liable to TRSL for repayment of such benefits.

1 www.TRSL.org • 1-877-ASK-TRSL • web.master@trsl.org 15.0 - RTW Overview

# Louisiana Return-to-Work (RTW) Laws

Applicable to any work arrangement in which a **TRSL retiree** is providing **TRSL-eligible services** to a **TRSL reporting agency**. Includes part-time, seasonal, and temporary employment; employment by contract or corporate contract

<p><u>La. R.S. 11:710</u> <b>2010 RTW Group</b></p>	<p>Retired <b>before</b> July 1, 2020 <b>Standard transfer option:</b> can elect to move into the “new” group. This is an irrevocable election; retiree is permanently forfeiting their eligibility to “old” categories</p>
<p><u>La. R.S. 11:710.1</u> <b>2020 RTW Group</b></p>	<p>Retired <b>on/after</b> July 1, 2020 + those who elect to transfer from 2010 to 2020 group <b>Special transfer option:</b> individuals who retired before July 1, 2020, may have been placed into this group based on previous eligibility criteria (first date of reemployment) These individuals may elect to move into the “old” group</p>
<p><u>La. R.S. 11:710.2</u> <b>2022 RTW Group</b></p>	<p>Higher education critical shortage (adjunct professor in a nursing program where a critical shortage exists)</p>

# 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



**2010**

- Grandfathered Group (1173)
- Advanced Speech
- Retired Member  
(Suspension)

**2020**

- RTW Supplemental (RTW  
Option 2/ACT-RET)
- Contracted/Corporate  
Contract Employment  
(Suspension)

- Earnings Limit
- Critical Shortage

# 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
- 11RTW 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

# 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.

# 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”

# Identifying retiree's group

## Status Information

Sys	Seq	Status	Code	Date	DROP Record
4	0	DROP RET	(RR)	06/30/2016	<a href="#">DROP Summary</a>
4		RTW921-394	(SC)	08/02/2024	

Employment History					
Empr ID	Emp Ind	Employer Name	RTW Type	RTW Portal	Employment Dates
	P	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](#)

# 2010 RTW Provisions

<b>Benefit Impact</b>	<b>No impact</b>	<b>Earnings Limit</b> (25% of Benefit)	<b>Suspended benefit</b>
<b>Position eligibility</b>	Grandfathered group & advanced speech	Adjunct, tutor of K-12 students, proctor, presenter of professional development	All other positions, including administrative, athletic, clerical, etc.
<b>Contribution requirement</b>	<u>Yes</u> , refundable upon terminating reemployment	<u>Yes</u> , refundable upon terminating reemployment	<u>No</u>

# 2020 RTW Options

Option	RTW Option 1 Earnings Limit / 25% FAC	RTW Option 2 Suspended benefit	Contract Employment Suspended Benefit
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
Contribution requirement	<u>Yes</u> , refundable upon terminating reemployment	<u>Yes</u> , accrues supplemental benefit (11RTW & DOT needed to resume)	<u>No</u> (DOT needed to resume)

# 2022 RTW Options

Critical Shortage	No impact	Adjunct professor in a nursing program where a shortage exists	<u>Yes</u> refundable upon termination
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# 2022 RTW Law (La. R.S. 11:710.2) *\*Higher Ed Only\**

Applies to adjunct professor positions in a nursing program where a *critical shortage exists*

## Retiree eligibility:

- Retired on/before June 30, 2020
- Have at least 30 years of service
- Be at least age 62

## To declare:

- Must list unfilled positions or positions filled by retirees on websites of:
1. Post-secondary institution
  2. Institution's management board
  3. Board of Regents



# 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@trsl.org](mailto:kelly.resnick@trsl.org)

Phone: 225-925-6929

# 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





# THANK YOU!

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