

Slide 1 - Introduction



Welcome to our TRS Membership Eligibility training session. This training is designed for Senior University, Medical/Dental University, and Community and Junior College Employers.

Slide 2 - Disclosure

Disclosure





This presentation is intended as a high-level overview of TRS laws and rules related to reporting. This presentation should not be viewed as a comprehensive overview of the TRS reporting process.



The information in this presentation is based on the TRS laws and rules as of the current fiscal year.



Please see the various RE Portal training and resources available on the TRS website for more complete information.



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This training is based on the TRS laws and rules as of the current fiscal year. In addition to the information shared in this video, please see the various Reporting Employer (RE) Portal trainings and resources available on the TRS website for more complete information.

Slide 3 – Overview of Topics

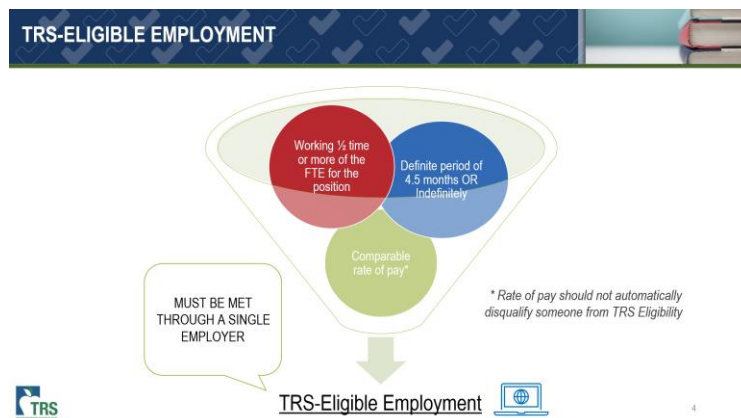


In this training, we will discuss eligibility requirements for TRS membership and determine when eligibility should be evaluated or reevaluated. We will define Full-Time Equivalent (FTE) and discuss determining half time with clock-hour conversion examples.

We will also review information specific to adjunct employment and look at some examples that are specific to adjunct employees.

Additionally, we will discuss the differences between temporary employment and irregular employment. As well as some additional considerations related to TRS membership.

Slide 4 – TRS-Eligible Employment



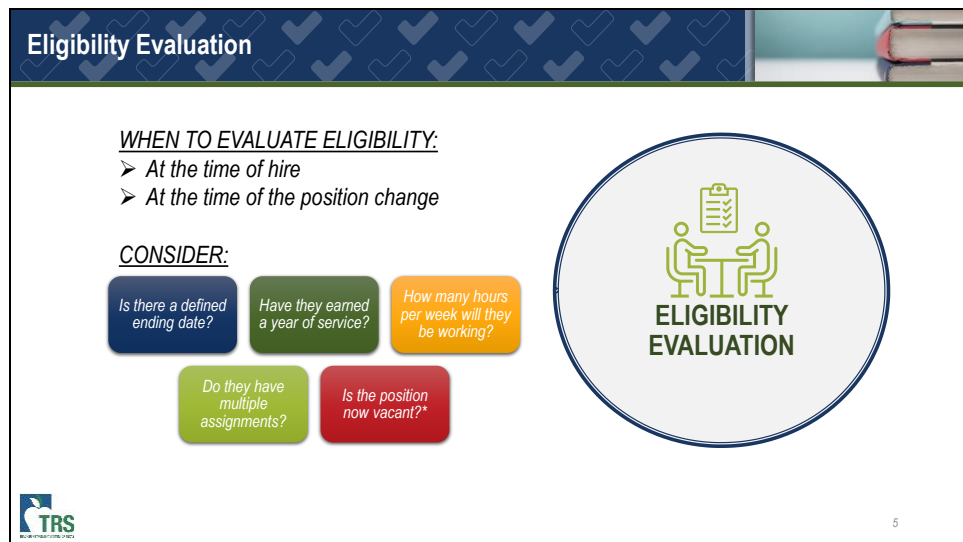
An employee working for a TRS-covered Reporting Employer may be eligible for TRS membership if they meet the following three requirements:

- They are working at least one-half of the standard full-time workload or more for the position;
- The position must be expected to continue for a definite period of at least 4½ months or indefinitely or actually continue for longer than 4½ months; and
- Must be paid at a comparable rate of pay as other individuals in the same or similar position. However, in some cases, this requirement can vary and may not automatically disqualify an individual from TRS eligibility even if the individual has a rate of pay different from others in similar positions. If you encounter a scenario where an employee is not meeting this third requirement, please reach out to your TRS coach for further assistance.

All three requirements must be met through a *single* RE. Please review the concurrent employment training available on our website for information on how concurrent employment impacts TRS membership eligibility.

[TRS-Eligible Employment](#)

Slide 5 – Eligibility Evaluation



TRS membership eligibility must be determined at the time of hire. However, there are some scenarios where eligibility may need to be reevaluated. The two most common examples of when you would need to reevaluate eligibility are when the employee has changed positions OR the original expectation changed. In these scenarios, the eligibility requirements would need to be evaluated from the date the change was made.

To help make that determination, we have included some helpful questions to consider:

- Is there a defined ending date for this employee's position?
- Has the employee earned a year of service?
- How many hours per week is the employee expected to work? Is this expectation one-half time or more of the FTE?
- Does the employee have multiple assignments at your RE?
- Is this a vacant position?

Slide 6 – FTE Defined

FTE Defined



The number of hours per week that the employee must work to be considered full time in their primary position.

Based on the position not the person

FTE must be a whole number between 30 – 40 hours



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For your RE to determine whether an employee is working one-half or more of the workload of a full-time position, you will need to determine what the equivalent full-time position (also known as “full-time equivalent” or “FTE”) is for the position the employee is working. This involves determining the number of hours per week an employee in a given position must work for your RE to consider the role full time.

An FTE can be any whole number between 30 and 40 hours per week and for TRS purposes, the FTE may not be anything less than 30. If you have a position that does not have an FTE or the FTE is less than 30, you will report the FTE to TRS as 00. Once the FTE for the position has been determined, any employee working one-half time or more of that FTE will be meeting the first TRS membership eligibility requirement. If the position does not have an FTE or the FTE is less than 30, any employee working 15 hours per week or more would meet the first TRS membership eligibility requirement.

For example, if the position has an FTE of 40 hours per week, any employee expected to work 20 or more hours per week meets the first TRS membership eligibility requirement.

Slide 7 – FTE Examples



The slide features a dark blue header with the text 'FTE Examples' and a decorative pattern of white checkmarks. To the right of the header is a small image of a stack of books. Below the header is a table with two columns: 'FTE' and 'Halftime of the FTE'. The table lists FTE values from 40 down to 00, with corresponding halftime values. Two callout boxes provide additional context: one on the left explains that if the employee's position doesn't have a full-time equivalent, '00' should be entered; another on the right states that if an employee works at least one-half of the FTE on a per week basis, they are meeting the first requirement for eligible employment. The TRS logo is located at the bottom left of the slide.

FTE	Halftime of the FTE
40	20
39	19.5
38	19
37	18.5
36	18
35	17.5
34	17
33	16.5
32	16
31	15.5
30	15
00	15

If the employee's position doesn't have a full-time equivalent, enter "00"

If an employee hired to work at least one-half of the FTE on a per week basis, they are meeting the first requirement for eligible employment.

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This chart provides a breakdown of possible FTEs and how many hours per week the employee in the position would need to work to meet the one-half time or more FTE eligibility requirement. This can be a valuable resource to reference when determining how many hours per week an employee should be working based on their TRS eligibility.

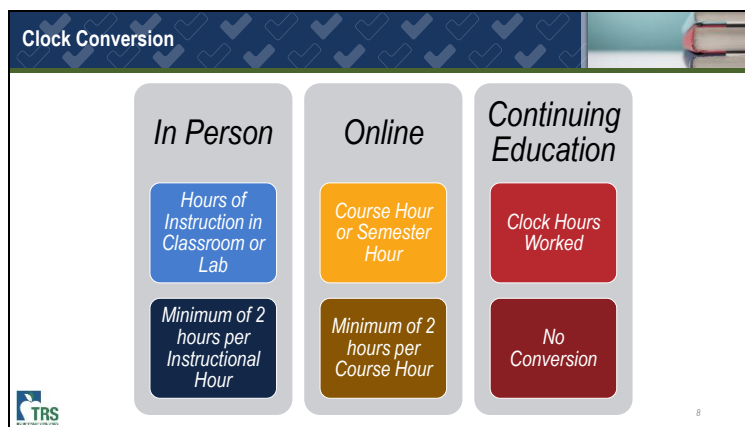
If your RE's intention is for the employee to be TRS membership eligible, the hours listed under the one-half time of the FTE column would be the *minimum* hours per week the employee should be working.

For example, if the FTE for the position is 36, the employee would need to work 18 hours per week, or more, to meet the first eligibility requirement.

If your RE's intention is for the employee NOT be TRS membership eligible, they should be working *less than* the hours listed under the "one-half time of the FTE" column.

For example, if the position's FTE is 38 hours per week, the employee would need to be working *less than* 19 hours per week, not up to 19 hours.

Slide 8 – Clock Conversion



Employment as an instructor at institutions of higher education—including community and junior colleges—must be evaluated based on instructional time. This includes teaching courses for college credit or preparatory classes for college-level work. Instruction measured by courses, semester hours, instructional units, or other time-based formats must be converted to clock hours.

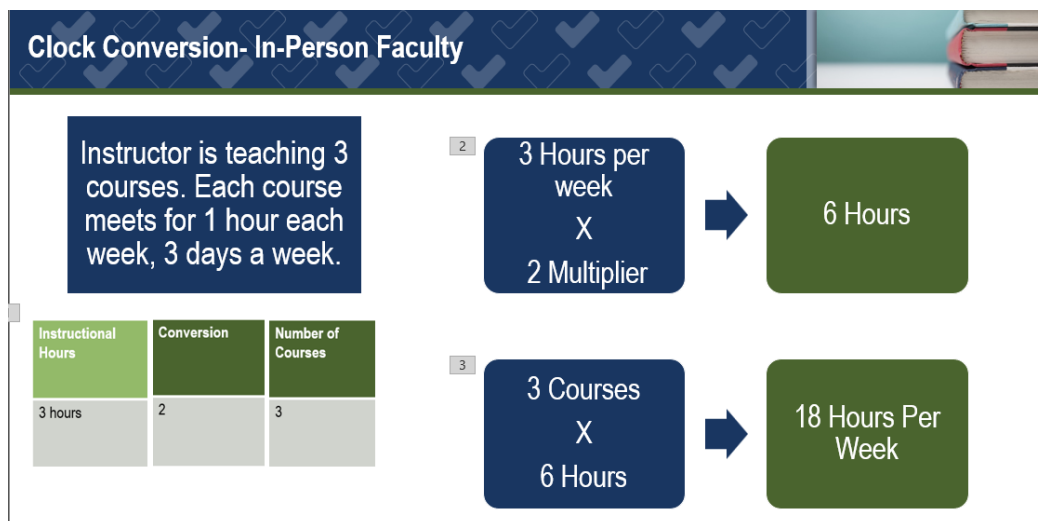
Employment as an in-person instructor must be converted as a *minimum* of **two clock hours** for each hour of instruction or time in the classroom or lab to accurately reflect not only classroom or lab time but also preparation, grading and related instructional duties for In-Person courses. This clock hour conversion is then used to determine if the employee is working one half-time or more based on the FTE described in the chart on the previous slide.

If the RE has established a greater amount of preparation time for each hour in the classroom or lab, the RE's standard will be used to determine the number of clock hours scheduled for work.

Employment as an online instructor for courses taken by students for college credit, whether measured by the number of courses, semester hours, instructional units, or other time-based formats—must be converted to clock hours. To account for instructional time as well as preparation, grading and related duties, each course or semester hour must be counted as a minimum of **two clock hours**.

Employment as an instructor of continuing education, adult education or classes provided to employers for employee training must be evaluated based on clock hours worked. These types of instruction are **not measured** by the number of courses, semester hours, instructional units, or other academic time formats. Additionally, because students or participants **do not receive college credit**, eligibility for membership must be determined solely by the **number of clock hours** the instructor worked. There is no conversion like online **or** in-person courses.

Slide 9 – Clock Conversion – In-Person Faculty



The following demonstrates how to calculate one-half time hours for higher education instructors. First, we will calculate the weekly hours for an instructor teaching **In- Person** courses.

If an instructor is teaching in the classroom, then we must use the hours of instruction in the classroom or lab, multiplied by the minimum conversion rate of two to obtain the hours per week. Remember, if your RE has a higher conversion rate, you would use that instead.

- On our first table, the instructor is teaching three courses, and each course meets for one hour each day, three days a week. We take the total hours of classroom instruction per day (3 hours) and multiply that by the employer's multiplier (two) which equals six clock hours per day. Multiply those six hours by three classes for a total of 18 hours per week. If they are an adjunct instructor or if their FTE for the position is 40 hours per week, then this person is not eligible for TRS since they are only working 18 hours per week.

Slide 10 - Clock Conversion – In-Person Faculty

Clock Conversion- In-Person Faculty

Same instructor picks up one additional class totaling 4 courses.

Instructional Hours	Conversion	Number of Courses
4 hours	2	4

1 4 Hours per week
X
2 Multiplier
→ 8 Hours

2 4 Courses
X
8 Hours
→ 32 Hours Per Week

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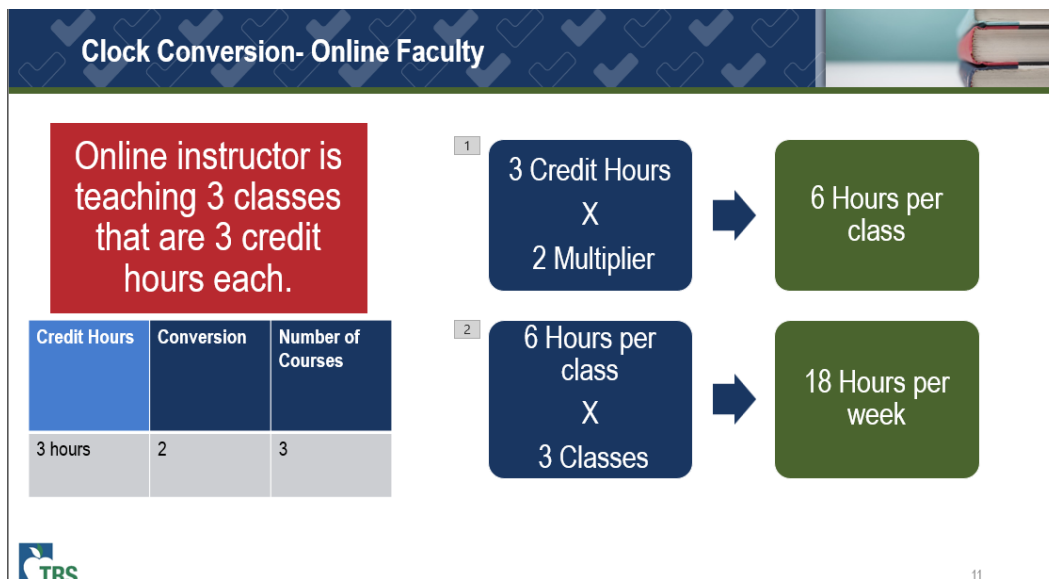
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If the same instructor picks up one additional class, increasing the total number of courses to four and increasing the hours of instruction per week to four, we can use the same calculation method.

Taking the four hours per week these classes meet and multiple by the multiplier of two, we get a total of eight hours per week.

Next, take the eight hours and multiply this by the total number of courses the instructor is teaching of four. In this example, the instructor would be working a total of 32 clock hours per week and therefore, working more than one-half time.

Slide 11 - Clock Conversion – Online Faculty

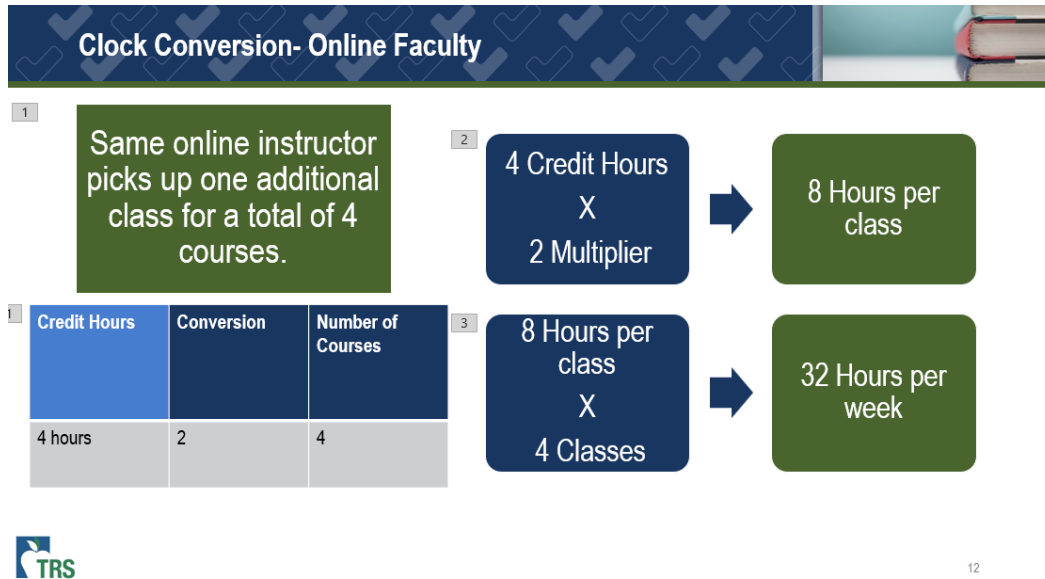


For an instructor who is teaching online, each course or semester hour must be counted as a minimum of two clock hours. For this example, the instructor is teaching three classes that are three credit hours each, and the RE uses the conversion multiplier of two.

Since this person is teaching a three-hour online course, take those three credit hours and convert them to clock hours. So, three times two equals six clock hours per class.

Next, take the six hours and multiply this by the total number of courses the instructor is teaching of three. In this example, the instructor would be working a total of 18 clock hours per week and therefore, working more than one-half time. Again, this would not be eligible for an employee with the FTE of 40 or an adjunct professor since it is less than one-half time.

Slide 12 - Clock Conversion – Online Faculty



However, if the same online instructor picks up one additional class totaling four courses, increasing their credit hours to four, the hours per week needs to be recalculated. Using the same calculation method from the previous example, take the four credit hours and multiply by the multiplier of two which equals a total of eight hours per class.

Then, take the eight hours per class and multiply by the total number of classes taught (four) to determine that the instructor is working a total of 32 hours per week. Based on this calculation, the instructor would be working more than one-half time. Now let's discuss the definition of an adjunct for TRS reporting

Slide 13 – Adjunct Definition

Adjunct Definition

- Filled on a semester-by-semester basis, compensated on a per class basis, and the duties include only those directly related to instruction of students.
- Eligible if:
 - Working more than 20 hours per week
 - Expected to continue more than one semester



**Adjunct
=
Semester Basis**



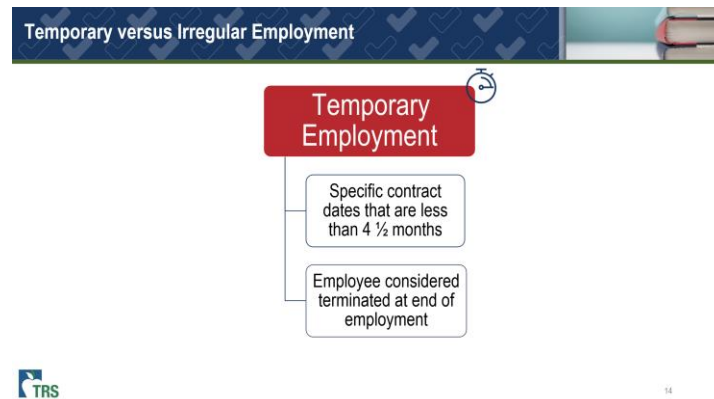
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For higher education, instructors that are adjuncts would need to meet the TRS definition for an adjunct employee. TRS defines adjunct employees as a position filled on a semester-by-semester basis, compensated on a per class basis, and the duties include only those directly related to instruction of students. For eligibility purposes, adjuncts are eligible if they meet the following two requirements:

- working 20 or more hours per week
- expected to continue, or does continue, more than one semester

For more in-depth information regarding Adjunct TRS membership eligibility, please review our Adjunct eLearning training video available on the TRS website.

Slide 14 – Temporary versus Irregular Employment



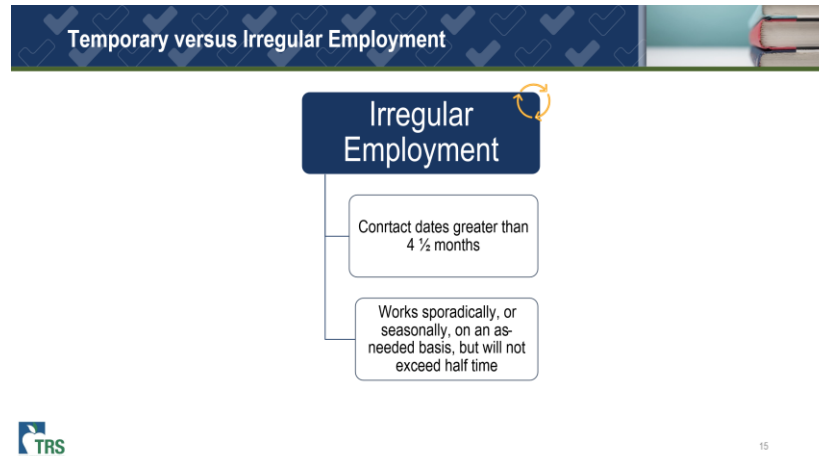
If an employee's position is *not* expected to continue for a definite period of at least 4½ months or indefinitely, it may be Temporary or Irregular employment. The following examples show the difference between temporary employment and irregular employment since they are commonly reported incorrectly.

For temporary employment, the employee's work agreement needs to meet these two expectations:

- Your RE has defined the beginning and ending date of their employment and the length of time is less than 4½ months or does not continue for more than one semester.
- Once this work agreement is completed, the employee is no longer considered an employee of your RE.

For example, your RE has hired a grounds keeper to work full time during the summer break. Their work agreement states they will work from May 15 through Aug. 15 and there isn't an agreement for additional work after the original work agreement has ended. In this example, your RE would report the employee's ED40 with M for Temporary Employment since it meets all the requirements for this employment type.

Slide 15 –Temporary versus Irregular Employment



The second employment type is Irregular employment. The expectation for this employment type is that the employee may work for a period greater than 4½ months but will be working sporadically or on an as needed basis throughout the work agreement.

For example, an employee is hired to assist the robotics team when they travel to other locations for competitions. The employee will be helping load and unload the bus. Since this employee's work is dependent on the dates the robotics team is traveling for competitions, this can be considered irregular employment. There is no guarantee of work every day of the week and the employee is only working specific days throughout the year. When reporting this employee to TRS, the RE will submit an ED40 with employment type of P for Less Than Half-Time employment.

Slide 16 – Additional Considerations

Additional Considerations

Earning Year of Service

- Eligible through end of fiscal year (Aug. 31)
- Exception: Substitute Work

Vacant Positions

- If position meets eligibility requirements, employee must be reported as eligible.

 [TRS Benefits Handbook](#) 

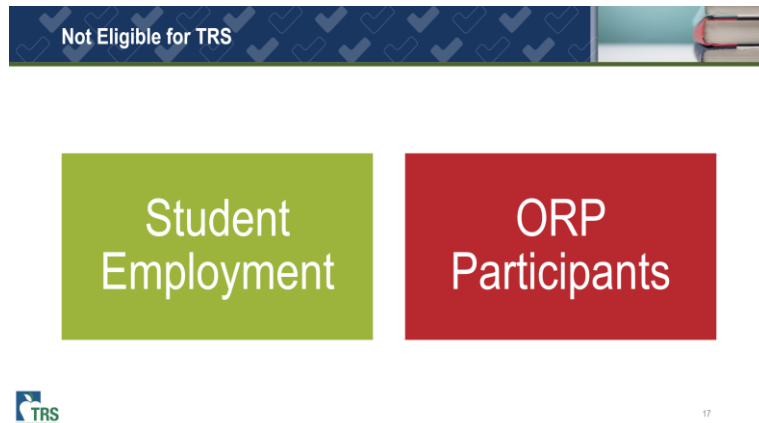
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Another way that someone who is working less than half time may be eligible is when they have earned a year of service.

Once someone has earned a year of service, then all work that the employee performs for the remainder of the TRS year (until Aug. 31) will be eligible. The only exception is when the work performed after a year of service is earned consists of Substitute work. Please refer to the [TRS Benefits Handbook](#) for more information on earning a year of service.

If an employee is hired to work in a vacant position, TRS membership eligibility needs to be evaluated as of the first date they begin work in the position. Determine if the RE expects the individual to continue working in the vacant position and whether the defined end date meets the 4½-month or more eligibility requirement? If the individual is expected to fill the vacant position until someone is hired, the work is considered indefinite, and the employee meets the second TRS eligibility requirement.

Slide 17 – Not Eligible for TRS



Employment by a Texas public college or university when being enrolled as a student is a condition of employment is *never* eligible for TRS. Under TRS Rules, Chapter 25, Rule 25.10 Student Employment, these positions do not qualify for TRS membership, cannot be used to establish TRS eligibility, and are not required to be reported by the RE.

ORP or the “Optional Retirement Program” is an alternative retirement program available to eligible employees of institutions of higher education in lieu of membership in TRS. Electing ORP is a one-time, **irrevocable** election. Once an employee elects to participate in ORP, their TRS membership is terminated, and they **are not** eligible to participate in TRS as long as they remain in ORP. For more information about ORP elections and requirements of the election please see our ORP training.

Slide 18 - Resources

The screenshot shows the 'Resources' section of the TRS website. The page has a dark blue header with the word 'Resources' in white. Below the header, there are two main columns. The left column is titled 'Employers' and contains a list of links under the 'General Resources' section. The right column is titled 'Reference Guides/ Materials' and contains a list of links. A central graphic shows a hand pointing at a screen displaying 'Reporting Resources and Payroll Manuals'. Red arrows indicate the navigation path from 'Quick Start Guide For Employers' to the central graphic, and from the central graphic to the 'Payroll Manual (Higher Education)' and 'Payroll Manual (Public Schools)' links in the right column.

Resources

Employers

General Resources

- [Quick Start Guide For Employers](#)
- [Employment Eligible for TRS Membership](#)
- [Optional Retirement Program](#)
- [Employer Advisory Group](#)
- [Update Employer Newsletter](#)
- [Member Education Resources](#)

Compensation Resources

Contribution Resources

EAR Reporting

Reporting Employer Training & Resources

GASB Statements

Employer Audits

Reporting Resources and Payroll Manuals

Helpful documents and links, including the Payroll Manuals, for TRS reporting.

[View Resources](#)

Reference Guides/ Materials

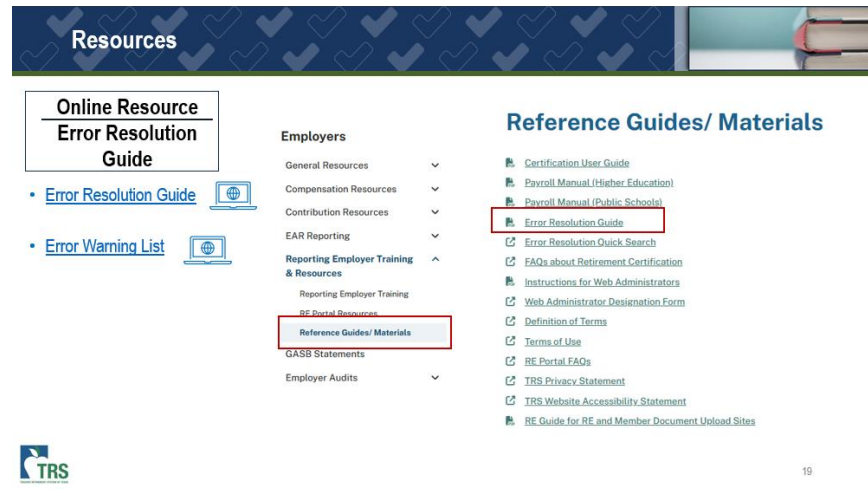
- [Certification User Guide](#)
- [Payroll Manual \(Higher Education\)](#)
- [Payroll Manual \(Public Schools\)](#)
- [Error Resolution Guide](#)
- [Error Resolution Quick Search](#)
- [FAQs about Retirement Certification](#)
- [Instructions for Web Administrators](#)
- [Web Administrator Designation Form](#)
- [Definition of Terms](#)
- [Terms of Use](#)
- [RE Portal FAQs](#)
- [TRS Privacy Statement](#)
- [TRS Website Accessibility Statement](#)
- [RE Guide for RE and Member Document Upload Sites](#)

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Additional resources, including the Payroll Manuals, can be found on the TRS website by navigating to our Employers page. From there you can click on “General Resources” on the left-hand menu and then go to “Quick Start Guide for Employers” where you will see the link for “Reporting Resources and Payroll Manuals” Or “Employment Eligible for TRS Membership.”

Slide 19 - Resources



Some other resources that are helpful for clearing errors are the “Error Resolution Guide” and “Error and Warning List,” or the “Error Resolution Quick Search.

The “[Error Resolution Guide](#)” covers the most common errors that appear on reports, so this may be something that you go to if you are receiving the same error every month and need a reminder on how to clear the error, or if an override may be needed.

The “[Error and Warning List](#)” is a complete list of all errors and warnings that appear in the portal. This list can be overwhelming since there are over 800 validations that appear in the system. However, this can be a good starting point if you are receiving a new error that you have not encountered before. This list includes a brief remedy, or it will indicate if you need to contact your coach for assistance.

When in doubt, your RE coach is the best resource available.

Slide 20 - Closing



Please contact your RE Coach for any questions.