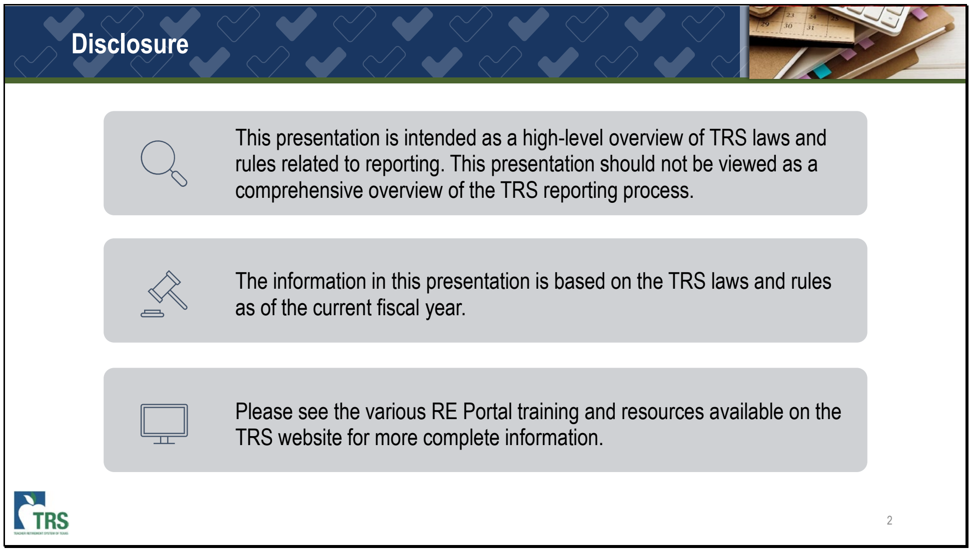
Slide 1 - Introduction

Welcome to our TRS Membership Eligibility training session. This training is designed for Independent School District (ISD), Education Service Center (ESC), and Charter School employers.

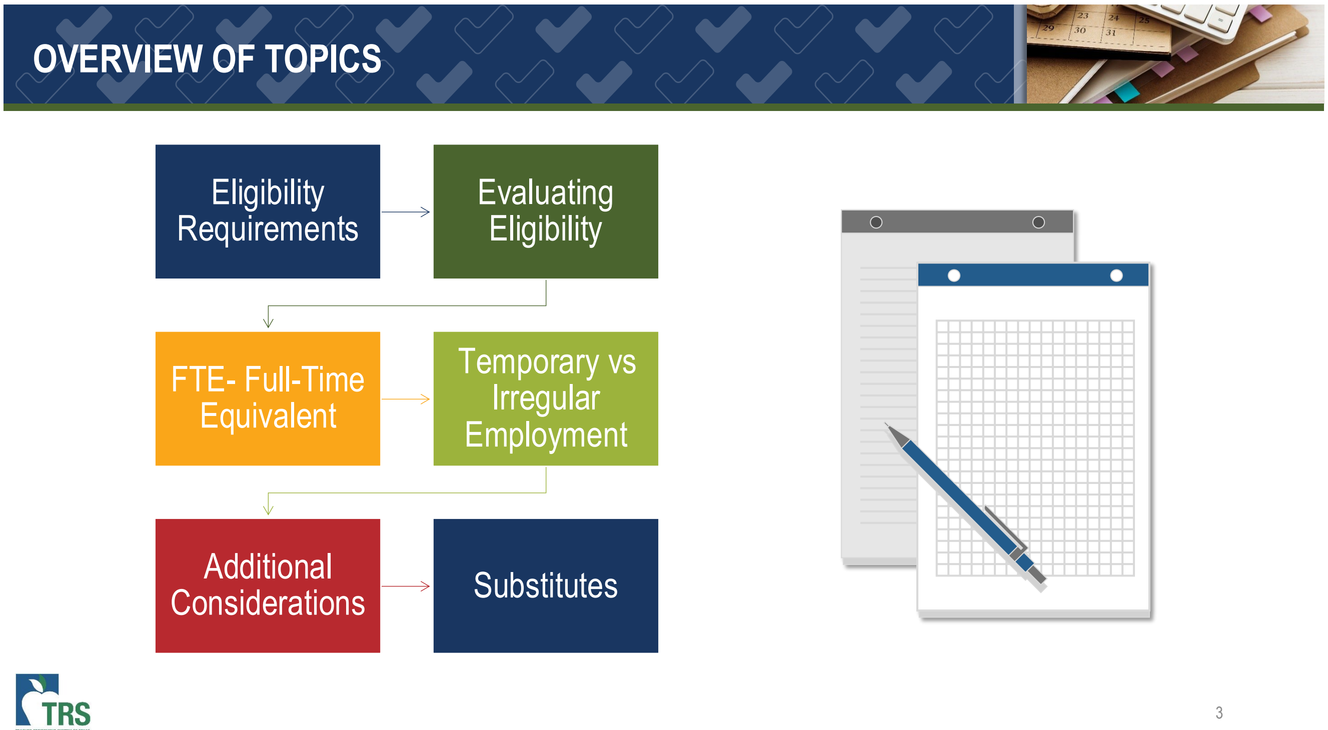
Slide 2 - Disclosure



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

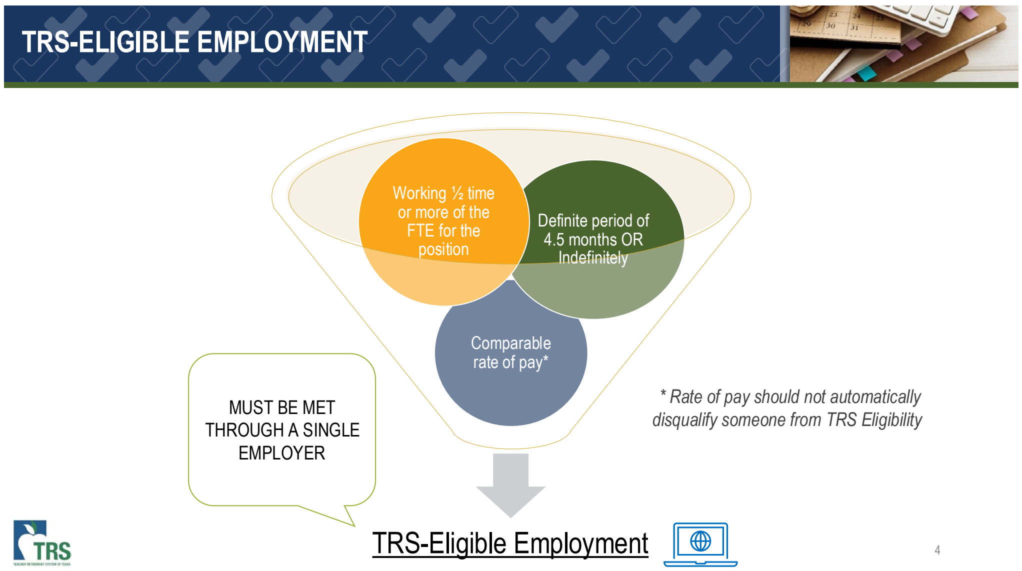
One below corrected



In this training, we will discuss eligibility requirements for TRS membership and determine when eligibility should be evaluated or reevaluated. We will also define Full-Time Equivalent (FTE), temporary employment, irregular employment, and discuss some additional considerations related to TRS membership.

Finally, we'll cover substitute employment.

Slide 4 – TRS Eligible Employment



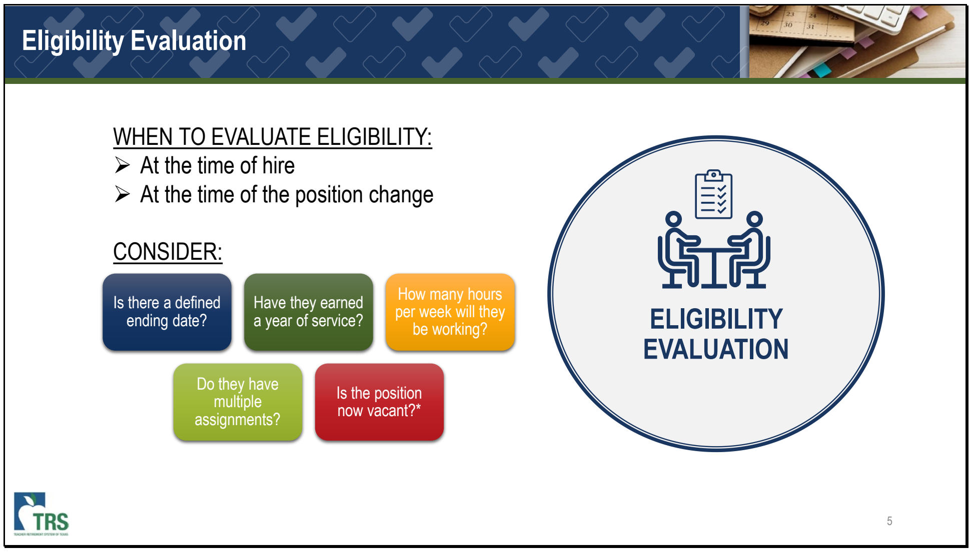
An employee working for a TRS-covered Reporting Employer may be eligible for TRS membership if they meet the following three requirements:

- They work 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 in which an employee appears not to meet 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

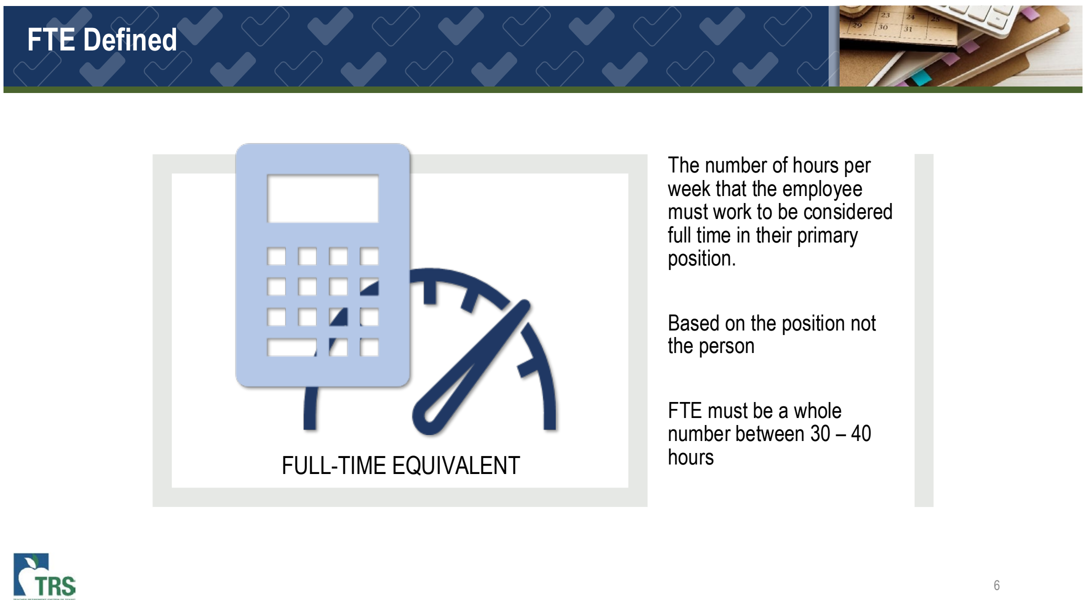


TRS membership eligibility must be determined at the time of hire. However, there are other scenarios where eligibility may need to be reevaluated. The two most common examples of when an RE needs to reevaluate eligibility are when the employee has changed positions OR the original expectation changed. 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

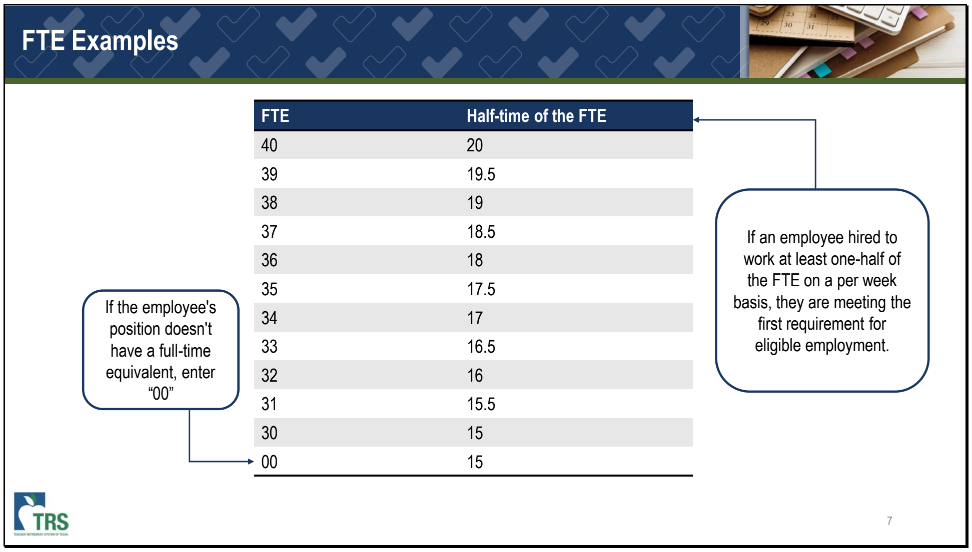


For your RE to determine whether an employee is working one-half or more of the workload of a full-time position, you will need to determine what the equivalent full-time position (also known as “full-time equivalent”, or “FTE”) is for the position the employee is working. This means, determining how many hours per week any employee working the same position needs to work for your RE to consider them full time.

An FTE can be any whole number between 30 to 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, that means any employee expected to work 20 or more hours per week meets the first TRS membership eligibility requirement.

Slide 7 – FTE Examples



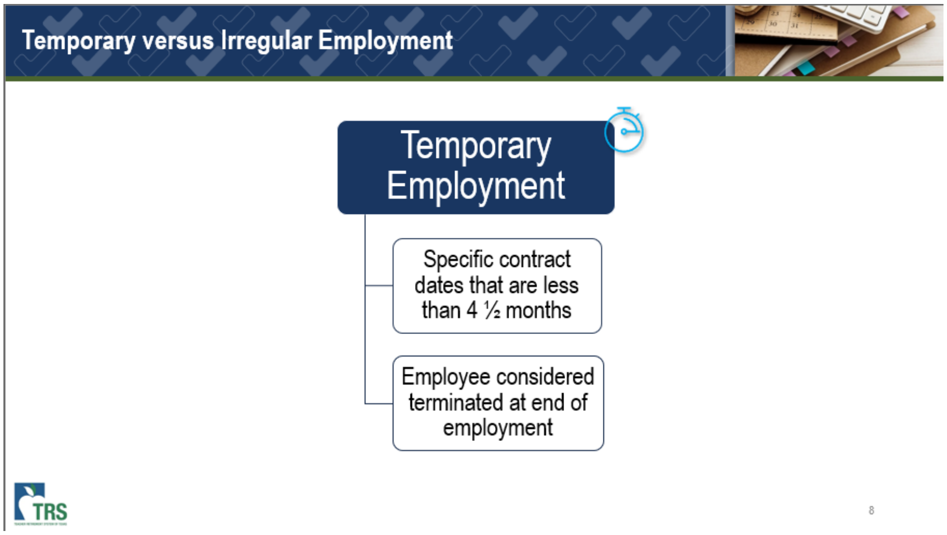
This chart provides a breakdown of possible FTEs and how many hours per week the employee in the position would need to work to meet the one-half time or more FTE eligibility requirement. This can be a valuable resource to reference when determining how many hours per week an employee should be working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

If your RE intends for the employee to be TRS membership eligible, the hours listed in the one-half time of the FTE column represent the *minimum* number of hours per week the employee should work. 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.

To ensure an employee is NOT TRS membership eligible, they must work *fewer hours than* the those listed under the “one-half time of the FTE” column.

For example, if the position’s FTE is 38 hours per week, the employee must work *less than* 19 hours per week, not up to 19 hours.

Slide 8 – Temporary versus Irregular Employment



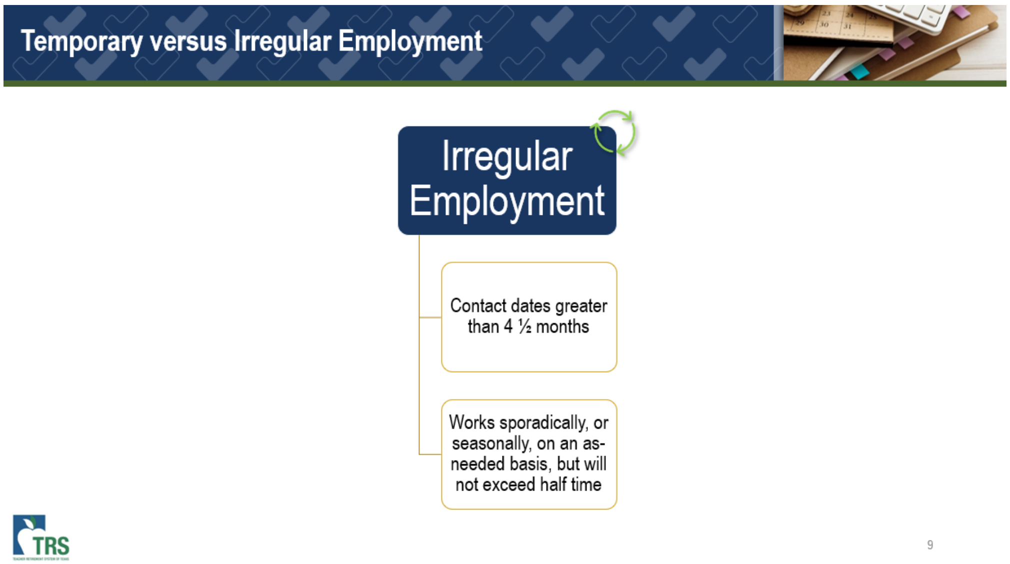
If an employee's position is *not* expected to continue for a definite period of at least 4½ months or indefinitely, it may be Temporary or Irregular employment. The following examples show the difference between temporary employment and irregular employment since they are commonly reported incorrectly.

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

- Your RE has defined the beginning and ending date of employment and the length of time is less than 4½ months.
- 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 employees ED40 with M for Temporary Employment since it meets all the requirements for this employment type.

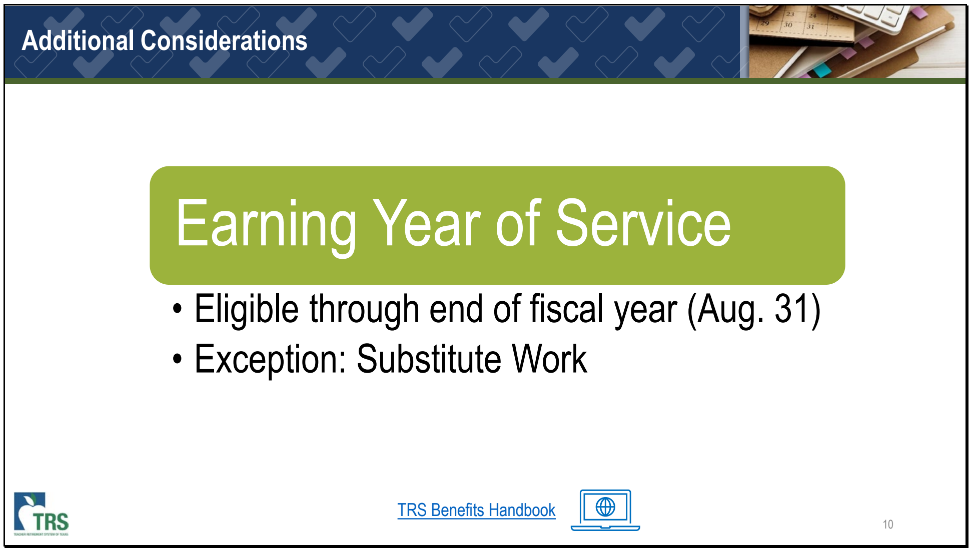
Slide 9 –



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 they will be working sporadically or on an as needed basis throughout the work agreement.

For example, you hire an employee 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 not a set regular work schedule, such as working every day of the week, and the employee is only working specific days throughout the year. When reporting this employee to TRS, your RE will submit an ED40 with employment type of Less Than One-Half Time employment.

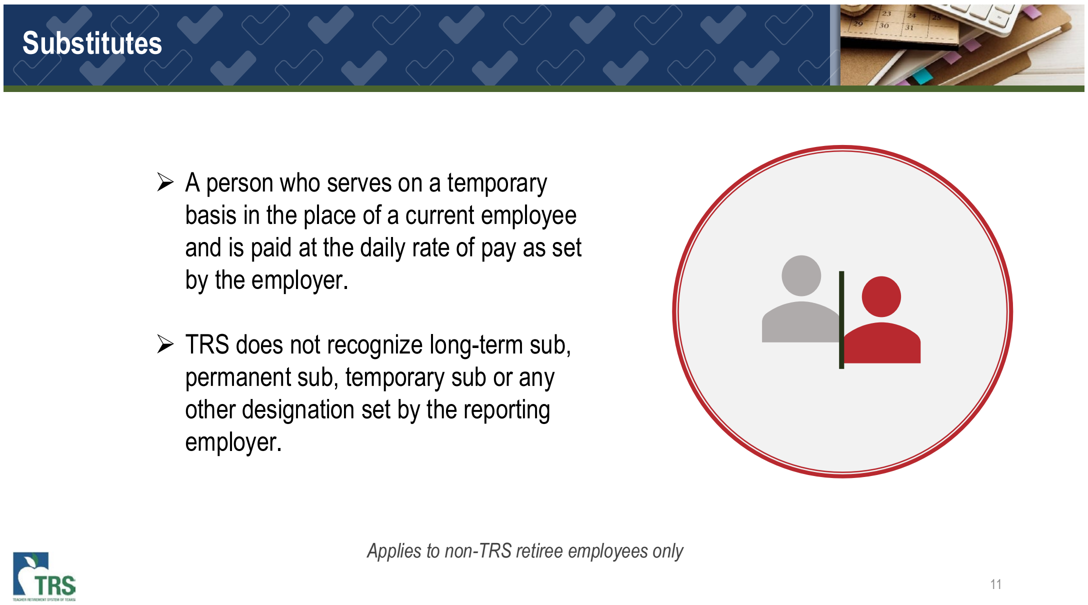
Slide 10 – Additional Considerations



Another way that someone who is working less than one-half time may be eligible for TRS membership 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 earned service is Substitute work. Please refer to the *TRS Benefits Handbook* for more information on earning a year of service.

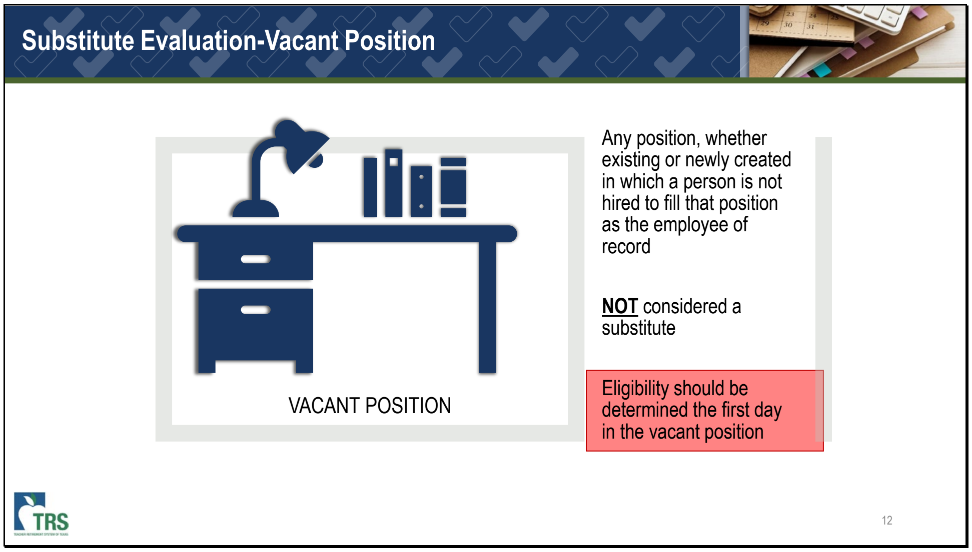
Slide 11 - Substitutes



The TRS definition of substitute employment for reporting purposes is defined as a person who serves on a temporary basis in the place of a current employee and is paid at the daily rate of pay as set by the reporting employer.

In addition, simply giving the employee a substitute term as their employment title (such as long term, permanent or temporary substitutes, or any other designation) does not make them a substitute if they do not meet the TRS definition of a substitute.

Slide 12 – Substitute Evaluation – Vacant Position



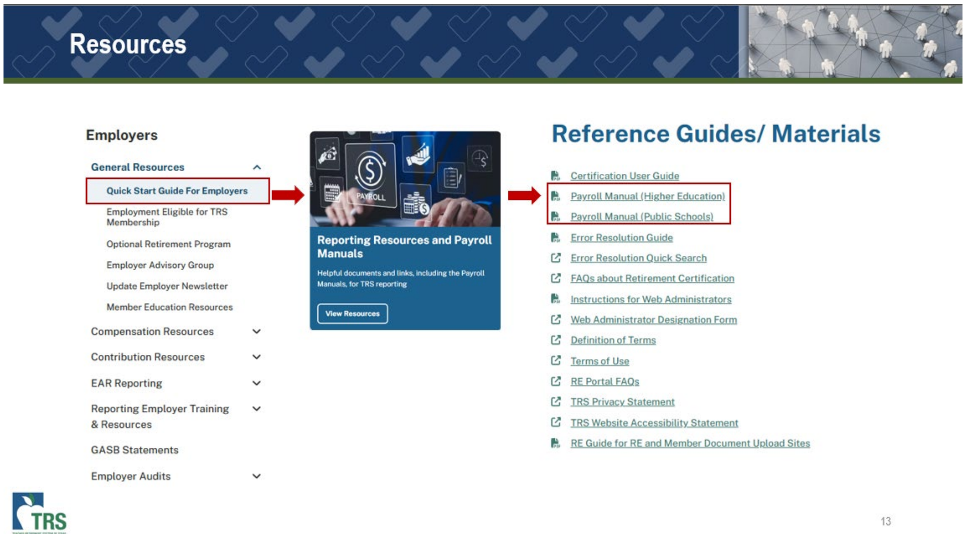
Now that we have reviewed how TRS defines substitute employment, let's discuss scenarios where an employee is placed into a vacant position. Since the position is vacant and there is no employee of record, anyone filling in would ***not*** be considered a substitute.

This applies to any person in any position, whether existing or newly created, even if the person is not hired to fill that position as the employee of record.

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 working the position. Determine if the RE expects the individual to continue working in the vacant position and if there is a defined ending date, does it meet the 4½-month or more eligibility requirement?

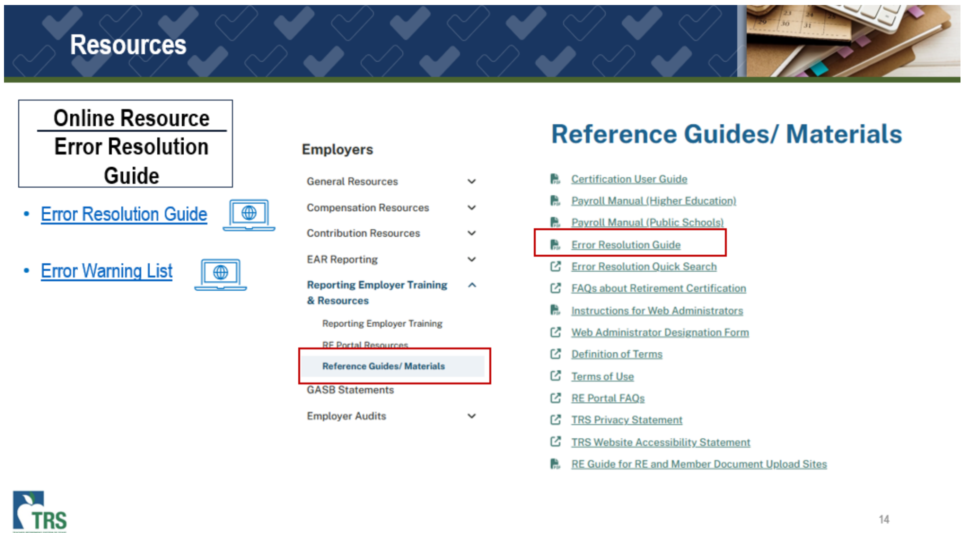
If your RE expects this individual to fill the vacant position until someone is hired, this is considered an indefinite period of time, and the employee meets the second TRS eligibility requirement. For more detailed information regarding substitute employment, please see our Reporting Tips – Substitute training available on the TRS website. If you need assistance determining whether an employee meets the TRS definition of a substitute, reach out to your RE Coach.

Slide 13 - Resources



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 14



Some other resources that are helpful for clearing errors are the “Error Resolution Guide” and “Error and Warning List”, along with 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 15 - Closing

For any questions, please contact your TRS RE coach.