



## Year-End Checklist

The following is a checklist of deadlines and compliance issues that you may need to address before year-end.

### **O If you have received a Missing Data Audit, return it as quickly as possible**

If your city receives a request for missing or incorrect information for an employee, such as date of birth or gender, please respond promptly. This information is critical for TMRS to complete its year-end processes.

### **O Expedite your December 2020 payroll**

All monthly payroll reports and contributions are due by the 15<sup>th</sup> of the following month. In January, TMRS must receive the December payroll **no later than January 15** in order to complete our year-end processes. Missing this date could result in errors in your employees' 2020 Member Annual Statements, a late payment fee assessment, and delays in December 2020 retirements and refunds. For assistance, review the [Payroll Reference Guide](#) or contact our Member Service Center at 800-924-8677.

### **O Due by December 31, 2020:**

#### **"Stat Max" ordinances**

If your city requested a model ordinance to remove the Stat Max, TMRS must receive a copy of the ordinance by December 31 or it will not be effective and could adversely affect repeating plan benefits.

#### **COLA and Updated Service Credit (USC) ordinances**

If your city is adopting a COLA or USC ordinance to be effective January 1, 2021, TMRS must receive the ordinance by December 31, 2020. If your city has received a model ordinance from TMRS, City Services will call you to check on its status and answer any questions.

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## We Are Here to Help

There are several ways you and your employees can get help with your TMRS plan, including virtual counseling and webinar presentations.

To schedule an online meeting, email TMRS' [City Services](#) department. You can also speak to our Member Service Center by calling 800-924-8677, Monday – Friday, 8 a.m. to 5 p.m. For self-service options, visit the [City Portal](#) or the [TMRS website](#).