City Portal Training Manual
November 2019
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This manual is for the City Portal Administrator and the City Portal Authorized Users. It is an informal presentation of information about TMRS® and related issues. If any specific questions of fact or law should arise, the statutes will govern. TMRS, MyTMRS, the TMRS Logo, TMRSDirect, and the TMRSDirect logo are registered trademarks of the Texas Municipal Retirement System.

Version 2019.1 — November 2019
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The City Portal is an online tool (accessed through a secure web URL) that gives TMRS® cities self-service capabilities and access to both employee and city data.

As the City Portal develops, more web-based administrative features will be added. The most recent addition is a document upload feature which can be used as an alternative to faxing.

The City Portal is part of the TMRSDirect® strategic initiative to transform TMRS administration from paper-based processes to a “Straight-Through Processing” (STP) environment. The STP initiative will not only reduce paperwork but will improve data accuracy while enhancing the security and timeliness of our systems.

What Cities Can Do on the City Portal

Currently, Authorized Users may:

- Make member inquiries (such as account balances, payroll information, address on file)
- Run retirement estimates for the member
- Run city reports (so you can track such things as vested employees and retirement-eligible employees)
- Submit your monthly payroll files
- Enroll new members
- Upload documents as an alternative to faxing
- Access confidential documents

For example, TMRS posts documents your city’s Finance Officer and Auditor need while preparing financial statements under the GASB 68 guidelines (TMRS’ SOC-1 Audit Report and your city’s census data), as well as other information to assist your city with administering the TMRS plan.
City Portal Home

Work Areas in the Portal (Menu Bar)

The main navigation for the City Portal is contained in the tabbed gray bar on every page (as shown in the page headers of this manual).

The Texas Municipal Retirement System link in the brown bar at the top of the page allows you to open the TMRS public website from within the Portal. Note that it does not log you out of the City Portal, but may be useful if you need to access or download forms or information from the public website.

Under the Home tab, you can see:

- User’s city (with a link to the details of your city’s plan)
- The date of the city’s last Payroll Deposit
- Contact information for the city’s Portal Administrator
- TMRS Portal Contact
- A link to TMRS’ Regional Managers
- A list of the city’s registered City Portal Users (the User List is maintained by the city’s Portal Administrator)

Confidentiality of Information

Remember, all records of an individual member, retiree, annuitant, beneficiary, alternate payee, or other program participant, including any information identifiable with specific individuals provided via the City Portal, is confidential. Wrongful disclosure of confidential information is prohibited by Section 855.115 of the TMRS Act and Sections 552.101 and 552.0038 of the Public Information Act. The Public Information Act makes wrongful disclosure of confidential information a misdemeanor, classified as official misconduct.

If you receive requests for TMRS information (such as open records requests, media requests, requests by individuals other than the member, retiree, spouse, or others as provided by 855.115(a)(1)), please review them with your city attorney.
**Information for the City Portal Administrator**

**Becoming a City Portal Administrator**

Each city will have a single person designated as their City Portal Administrator, who is named when the city completes its City Portal Use Agreement. The Administrator will be the primary point of contact for all City Portal Users at the city and is the only person who can authorize and assign roles to other City Portal Users at the city. The full menu bar shown above will only be visible to the City Portal Administrator. The other features available to Users at the city will depend on the roles assigned to them by the Administrator.

In many cities, the City Portal Administrator will be the TMRS City Correspondent, but that determination will be made by each city. In many cities, the Administrator may be the only City Portal User, while in larger cities, there may be many Users, each assigned different roles or privileges on the City Portal.

The City Portal Administrator is responsible for:

- Assigning City Portal Users and privileges
- Training Users on the Portal, by providing them this manual
- Ensuring that member data is kept confidential
- Notifying TMRS if a new Administrator should be named

**How to Manage Users**

The Administrator sets the privileges for the city’s City Portal Users. The levels of privileges are:

- **HR** — Access to member data and the ability to run estimates for the member
- **Enrollment** — City Portal User can enroll new employees
- **Payroll** — User can submit monthly payroll
- **Reports** — User can run reports

The [Create New Users] tab allows you to add a new City Portal User. Select the check box by the new User’s email address and then click on the [Create Users] button.

When a new User has been created, TMRS sends an email providing him/her with a link to set up a user name and password. Once this has been done, the phrase “pending registration” will no longer appear after the user name on the City Portal. Any person assigned as a User must be an authorized city contact. It is very important to keep the city’s TMRS contacts accurate and updated. **Note:** If you do not see your city contacts listed, please send an email to cityportal@tmrs.com to have them added.
Information for the City Portal Administrator (continued)

IMPORTANT:
After the new User has followed the instructions to finish registration, the User’s name appears under the Existing Users tab and under the Edit User Privileges tab.

The Edit User Privileges tab shows all the city’s Users and allows the City Portal Administrator to add or remove privileges for those Users. On this tab, you select the privileges that the User is to have; in this case, the ability to upload Payroll. Then click on the Save User Privileges button.

Once this is done, the new privileges will appear by the User’s name under the Existing Users tab.

Keeping Portal Access Current

REMEMBER: It is extremely important to stay up-to-date on changes to City Portal Users. The City Portal Administrator and Users must be contributing TMRS members. So if Users are terminated or change job responsibilities, the City Portal Administrator will need to revoke their access to the City Portal.

What to Do if the City Portal Administrator Leaves

If you know you are leaving your position or will no longer be the City Portal Administrator, it is extremely important to designate and train someone to be the Administrator. Please notify TMRS right away! Send an email to cityportal@tmrs.com.

When Users leave their positions or are reassigned, contact TMRS immediately. Furthermore, to keep the Portal up-to-date, City Portal Administrators are responsible for logging in at least once every 30 days to prevent the city being suspended from the City Portal.
Becoming a City Portal User

The City Portal Administrator assigns City Portal Users. After you have been created as a User, you will receive an email from “City Portal.” This email provides you with a link to set up a user name and password. Depending on your City Portal privileges, you may see up to three tabs on this page: Home, Member Center Activity, and Report Activity.

**Member Center Activity** shows all Member Center and Enrollment activity, such as running reports and estimates.

**REMEMBER:** If a member logs in to MyTMRS, he or she will be able to see that an estimate has been run on his or her account. The City Portal Administrator should monitor usage of the City Portal within your city to ensure compliance with confidentiality laws and any workplace rules and regulations regarding employee information.

**Report Activity** shows when reports have been run and by whom.
In the **Member Center**, if you have the privileges for this section, you will be able to search member data for a city employee using his or her Social Security number.

The four tabs in the **Member Center** are **Account Info**, **Balance Summary**, **Balance Details**, and **Estimates**.

**IMPORTANT:** The information on these screens is confidential under State law.

### Account Info Tab

**John P Smith, TMRS ID:398896**

<table>
<thead>
<tr>
<th>Contact Info</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Date of Death</th>
<th>Fire/Police Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>John P Smith</td>
<td>M</td>
<td>02-08-1960</td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>1072 S. Fifth St</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portalville TX 76543</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Phone:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Phone: 512-555-1212</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Account Status:** Contributing

**Participation Date in Portalville:** 10-2010

**Termination Date in Portalville:**

**Last Deposit Received:** 04-2019

**Member Total Balance:** $17,370.29

**Vested:** Yes
Balance Summary Tab

John P Smith, TMRS ID: 398896

<table>
<thead>
<tr>
<th></th>
<th>Balance Summary</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>Total Service Credit</th>
<th>Total Member Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portalville, This Year</td>
<td>CS  4</td>
<td>RS  4</td>
<td>USERRA</td>
<td>Total Service Credit</td>
<td>Total Member Balance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portalville, Total</td>
<td>PS  103</td>
<td>MS  103</td>
<td>CC  103</td>
<td>$653.11</td>
<td>$17,370.29</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Membership</td>
<td>BB  103</td>
<td>PS  103</td>
<td>MS  103</td>
<td>$17,370.29</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: Only Mr. Brown’s service with your city will be shown. If a member has contributions or service that occurred when employed by another TMRS city, those contributions and service will not be reflected here.

The book icons and acronyms on this tab display the types of service credit:

- **CS** = current service
- **RS** = restricted prior service
- **PS** = prior service
- **BB** = buy back
- **USERRA** = military service during break in employment
- **CC** = concurrent service

Click on the book icon to see a definition of the service type.

To return to the Member Center page, close the window.

Balance Details Tab

This tab shows individual deposits to the employee’s account while working at your city. The list will display the last four years of information.

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Earned Date</th>
<th>Amount</th>
<th>Months</th>
<th>Match Ratio</th>
<th>Deposit Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Deposit</td>
<td>04-2019</td>
<td>145.06</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>03-2019</td>
<td>145.47</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>02-2019</td>
<td>145.06</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>01-2019</td>
<td>217.52</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>12-2018</td>
<td>144.83</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>11-2018</td>
<td>201.81</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
<tr>
<td>Regular Deposit</td>
<td>10-2018</td>
<td>142.99</td>
<td>1</td>
<td>2</td>
<td>7.0</td>
</tr>
</tbody>
</table>
Estimates Tab

This tab displays requested estimates for Mr. Brown. The blue links under Retirement Date open previously run estimates. The Estimates tab also has a link to Request new estimate. Note: There are some conditions (such as when an account is flagged for special handling) where an estimate cannot be run. IMPORTANT: Generally, City Portal Users should not run an estimate for a member without the member’s knowledge. A member who uses MyTMRS will be able to see that a City Portal User has run a previous estimate.

<table>
<thead>
<tr>
<th>Retirement Date</th>
<th>Request ID</th>
<th>Request Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-2023</td>
<td>1572630</td>
<td>10/17/2019 10:45 AM</td>
<td>Success</td>
</tr>
<tr>
<td>02-2020</td>
<td>1572629</td>
<td>10/17/2019 10:44 AM</td>
<td>Success</td>
</tr>
</tbody>
</table>

This is a list of the 20 most recently requested estimates during the last 60 days.

The link Request new estimate opens an estimate agreement. City Portal Users must agree to the Terms of Use every time an estimate is viewed.
Once you accept the agreement and terms of use, the new estimate opens. The top portion of this page shows when the estimate was requested, the member’s TMRS ID number, and the retirement date for which the annuity has been calculated. On the right, the requester, the member’s date of birth, the age at retirement, and the cities with which he or she has service are displayed.

The estimate also shows beneficiaries, including their names, their relationship to the member, their dates of birth, and how old they will be when the member retires.

Under the **Estimated Monthly Amounts** section, estimates for monthly annuities are shown. The seven retirement options show the amounts if a beneficiary is factored into the equation. The retirement estimates also show how the annuity would be affected if the member draws a partial lump sum payment at retirement.
Upload Document Tab

You can upload scanned documents to TMRS instead of faxing. Everyone that has access to the City Portal has access to upload documents.

- The files must be a .pdf, .tif, or .tiff file type in order to upload.
- There is a size limit shown on the screen. If your file exceeds that size, you must decrease the size of the document or break up the document into smaller files.
- You can only upload one file at a time, but you can combine forms into a single PDF (for example) for upload.

To upload the document, select the Browse button and choose the document you would like to upload. Once you choose the document you will see the name of the selected document in the browser window. Then click the Upload button. A confirmation message will appear at the top of the screen showing a successful upload.

Are you uploading:
- If you are uploading Payroll documents, please use the Payroll Tab (TMRS-3 and Electronic Payroll Files)
- Address change forms? Members can login to MyTMRS to make address changes.
- Beneficiary change forms? Most beneficiary changes can be made through MyTMRS by members logging in.
- New Member forms? You can enroll new members through the city portal (if you have the appropriate rights) and have the member register or login to MyTMRS and designate their beneficiary.
Enrolling New Members

Section 851.001 of the TMRS Act requires all employees who are regularly engaged in a position that normally requires services for 1,000 hours of work per year, to be enrolled in TMRS. Enrolling new members using the City Portal Enrollment feature eliminates the need for the member to complete a New Member Form (TMRS-16).

**IMPORTANT:** When the city enrolls employees online through the TMRS City Portal, the city should encourage the employee to register for a MyTMRS® account and designate their beneficiary. (Most members can register immediately if enrolled through the City Portal, but they may have to wait up to 10 days if they were previously a TMRS member.) Beneficiary choices that require spousal consent (for example, a married vested member naming a beneficiary other than his/her spouse) still require a paper form and a signature. MyTMRS will alert the member if spousal consent is necessary and will direct him/her to the correct form.

If you have enrollment privileges, follow these steps to enroll new employees.

1. Log on to the City Portal. A member may be enrolled by the Administrator or any registered User of the City Portal whom the Administrator has designated as having “Enrollment” rights.
2. On the main page, click on the **Enrollment** link.
3. Enter the new member’s personal information in each field of the **Enroll New Member** page.

   In most cases, your employee’s application for employment will contain the information you need for enrollment. You will also need the date of participation, monthly salary, and police/fire status.

   ![New Member Enrollment Form](image)

   **Note:** The fields you enter have some corrections and reminders built in. If you leave off an important item of information, you will get a reminder message.

   The address fields are automatically cross-checked with a United States Postal Service address database.

   You may use this button before or after you enter the zip code to verify address.
4. Review all entered information, then click **Enroll New Member**. The information you entered will be sent to TMRS. If a correction needs to be made, you may re-enroll the member with the correct information or contact TMRS.

5. Your new employee will be sent a **TMRS Member Benefits Guide** and a confirmation letter with all the employee’s information.

**Enrollment History**

This screen shows a list of the most recent member enrollments at your city.

<table>
<thead>
<tr>
<th>Creation User</th>
<th>Created</th>
<th>New Member's Name</th>
<th>New Member's SSN</th>
<th>View Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kimberly Smith</td>
<td>October 16, 2019</td>
<td>Brown, Joe</td>
<td>111-00-0078</td>
<td></td>
</tr>
</tbody>
</table>

This table shows the most recent 100 member enrollments made over the past 180 days.
Account Maintenance

On the Account Maintenance page, City Portal Users can view and change information about the City Portal account that has been set up for them.

<table>
<thead>
<tr>
<th>User Information</th>
<th>Reset Password</th>
<th>Reset Challenge Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>P_ADMIN</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:ksmith@portalville.com">ksmith@portalville.com</a></td>
<td>Contact TMRS to change your email address</td>
</tr>
</tbody>
</table>
Reports Tab

City Portal Users who have the reports privilege may download certain reports through the City Portal.

Each report displays information about your city’s employees or retirees and is available as a CSV or a PDF. For large cities, it may take a few moments for the information to download.

**Reports**

- **Retirement Eligibility** Choose file type: CSV, PDF
  
  A listing of each current and former employee of the city with their current retirement eligibility status or projected future eligible date

- **Vesting Eligibility** Choose file type: CSV, PDF
  
  A listing of each current and former employee of the city with their current vesting status or projected future vesting date

- **Member Service Credit Listing** Choose file type: CSV, PDF
  
  A listing of each current and former employee of the city with their credited service broken down by service type

- **Retiree Service Credit Listing** Choose file type: CSV, PDF
  
  A listing of each retired member of the city with their credited service broken down by service type.

- **Retiree Address Listing** Choose file type: CSV, PDF
  
  List of the names and address of retirees and beneficiaries of a city currently receiving a monthly annuity

- **Vested Members Need 7V Form** Choose file type: CSV, PDF
  
  List of all Vested Members who do not have a current TMRS 7V Beneficiary Form on file

- **12/31/2018 Valuation Census Data for GASB 68/75** Choose file type: XLSX
  
  File description and data summary for (1) active contributing members, (2) inactive non-contributing members and (3) retirees and beneficiaries as of the valuation date. GRS’ certification memorandum of the census data file accuracy can be found [here](#).
  
  **Internet Explorer users**: You may need to save this file locally before opening, depending on your Windows settings. To do this, “Right Click” on the XLSX link above and choose “Save target as...” and name the file with a .XLS extension. You will then be able to open your copy of the file directly from Excel.

- **12/31/2017 Valuation Census Data for GASB 68/75** Choose file type: XLSX
  
  File description and data summary for (1) active contributing members, (2) inactive non-contributing members and (3) retirees and beneficiaries as of the valuation date. GRS’ certification memorandum of the census data file accuracy can be found [here](#).
  
  **Internet Explorer users**: You may need to save this file locally before opening, depending on your Windows settings. To do this, “Right Click” on the XLSX link above and choose “Save target as...” and name the file with a .XLS extension. You will then be able to open your copy of the file directly from Excel.

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* The name of this report will be changing to “Members needing a Beneficiary Designation” since it will also include Not-Vested members needing a beneficiary designation.
Payroll Tab

Only Users with rights to upload payroll will see this option in the main menu. When you click on Payroll, the Payroll File Upload window opens, and you will be able to file city payroll electronically.

1. Browse your computer to the desired file
2. Select file
3. Send it to TMRS by clicking Submit

After the upload completes, you will see a “Done” message.

If you have questions about uploading payroll, or if you need to verify we received a file, send an email to cityportal@tmrs.com.
City Portal Help

The Contact TMRS link sends you to the contact information on the public TMRS website. If you have questions, need more information, or need assistance with the City Portal, send an email to cityportal@tmrs.com.

TMRS Contact Information

<table>
<thead>
<tr>
<th>TMRS Travel Team</th>
<th><a href="mailto:communications@tmrs.com">communications@tmrs.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>1200 North Interstate 35 Austin, TX 78701</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>P.O. Box 149153 Austin, TX 78714-9153</td>
</tr>
</tbody>
</table>

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Toll-free</td>
<td>800.924.8677</td>
<td></td>
</tr>
<tr>
<td>Local (in Austin)</td>
<td>512.476.7577</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>512.476.5576</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.tmrs.com">www.tmrs.com</a></td>
<td></td>
</tr>
<tr>
<td>Need Help?</td>
<td><a href="http://www.tmrs.com/contact.php">www.tmrs.com/contact.php</a></td>
<td></td>
</tr>
</tbody>
</table>

Information for All City Portal Users • Log Out

Log Out

Due to the confidentiality of member information, it is extremely important for City Portal Users to log out when finished with each session. The Texas Municipal Retirement System link in the brown bar allows you to open the TMRS website but does not log you out of the City Portal.

Terms of Service

At the bottom of every page on the City Portal is a link to the City Portal Terms of Service, the document signed by the City and the City Portal Administrator when the city signed up for the City Portal. It is available for review at any time.