STRENGTH IN NUMBERS
Membership and Retirement
Hot Topics

Debbie Muñoz • Director of Member Services
Peter Jeske• Business Analyst
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Moderator Colin Davidson • Regional Manager
Hot Topics

- Membership Processing
  - Enrollment
  - Compensation
  - Payroll
  - Correction of Error
  - Workers Compensation

- Retirement Processing
  - Application Process
  - Annuity Options
  - Changes After Retirement
Welcoming Remarks
Jim Parrish, Chair
TMRS Board of Trustees

TMRS – Strong By Design

Anthony Mills
Senior Regional Manager

TMRS 2017 Annual Training Seminar
Gaylord Texan Resort and Convention Center
October 25-27, 2017 • Grapevine, Texas

Membership Processes

Presentations available at www.tmrs.com/ats.php and on the mobile app (Sessions)
Hot Statistics

- 108,891
- 15,094
- 6,971
Enrollment

- Mandatory enrollment in TMRS for all employees employed in a position that normally requires 1,000 hours of work in a year.

- City determines eligibility based on the 1,000-hour rule.

- Cities should review their classifications periodically, especially positions classified as non-TMRS eligible.
Enrollment

- Seasonal, contract, temporary employees, and volunteer firefighters are NOT eligible

- Part-time and probationary employment
Compensation

TMRS generally defines compensation as “Employee’s gross wages paid by the city”

- Overtime Pay
- Car Allowances
- Uniform Allowances
- Sick leave
- Vacation pay
- Any additional taxable payments the employee receives from the city
Payroll Reporting

Monthly Payroll Reporting Process

- Employee’s contribution
- Employer’s contribution
- Submitting funds
- Certification

Payroll Reporting

TMRS encourages you to use the TMRS City Portal for electronic filing. To file your payrolls electronically, contact your City Portal Administrator to become registered. You can get started by sending an email to TMRS’ City Portal Contact, LaShelle.

Payroll Reporting (through FTP)

1. User Name and Password
   You will need a secure username and password to access TMRS Online and Secondary Account information using the Secure FTP form, the
Correction of Errors

The TMRS Act allows for correction no more than 4 years before the date the application for the correction is received in writing by TMRS

Examples of corrections include:

- Payroll reporting errors
- Enrollment errors
- Employment status
- Severance/Settlement Agreements
Workers’ Compensation

Who is paying the employee?

City only
- TMRS contribution should be withheld

Workers' Comp Only
- TMRS contribution is mandatory; however, City has no control and cannot force mbr to contribute

City and Worker's Comp
- TMRS contribution should be withheld based on total

Employee not getting paid
- No TMRS contribution allowed
- no months of credit

Who is paying the employee?
Workers’ Compensation

- Workers’ Compensation is income replacement insurance; therefore, TMRS contributions should be deducted from income received from WC.

- Employees can receive WC in various ways: insurer, city (self-insured), or combination of both.

- If contributions are not made, employee will not receive service credit towards retirement eligibility.
Workers’ Compensation

- If city pays WC, the city should send in contributions as it would for any other employee.

- If insurer pays WC, the city can ask the employee to send the city the employee contributions before it sends in contributions.

- If both the city and insurer are paying WC, the city should deduct the full employee contributions from its portion and send it in.
Retirement Processes

Presentations available at www.tmrs.com/ats.php and on the mobile app (Sessions)
Hot Statistics

■ 59,611
■ 3,456
■ $1.2 billion
Retirees choose from 7 possible payment plans
All plans pay for retiree’s lifetime
Retirees may choose a Partial Lump Sum Distribution (PLSD)
No changes allowed after first payment
Application Process

- **Eligibility**
  - 5/10 years at age 60
  - 20/25 years any age

- **Timing**
  - Statutory deadline

- **Documentation**
  - Completed forms
  - Spousal consent
  - Proof of Birth

- **Communication**
  - Application confirmation - All Paperwork in Order (APIO)
City Portal – Contributing Member Status

Texas Municipal Retirement System

Member Center

Find A Member
Individually identifiable information is confidential and is restricted by statute. By accessing this information on the TMRS City Portal, you are certifying to TMRS that your purpose is reasonably necessary to perform your official duties.

SSN
123-45-6789

Search

John Doe, TMRS ID:123456

Account Info | Balance Summary | Balance Details | Estimates
---|---|---|---

Basic Data
Contact Info
John Doe
555 Main St
Austin TX 78701
Home Phone: (555) 666-5555
Work Phone: (555) 666-5555

SSN
123-45-6789

Gender
M

Date Of Birth
01-01-1960

DOD

Fire/Police Type
N/A

MyTMRS allows members and retirees to change their addresses online.
All contact info may be changed directly by the user: mailing address, phone numbers, and email addresses.

Account Details and Eligibility Info
Account Status
Contributing

Participation Date in TMRS
02-2012

Termination Date in TMRS

Last Deposit Received
09-2017

Member Total Balance
$15,952.26

Vested
Yes

Eligible to Retire
No. 01-2020
City Portal – Pending Retirement Status

Texas Municipal Retirement System

Find A Member
Individually identifiable information is confidential and is restricted by statute. By accessing this information on the TMRS City Portal, you are certifying to TMRS that your purpose is reasonably necessary to perform your official duties.

SSN
123-45-6789

Search

Joe Member, TMRS ID: 123456

Account Info | Balance Summary | Balance Details | Estimates

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<thead>
<tr>
<th>Account Details and Eligibility Info</th>
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<tr>
<td><strong>Account Status</strong></td>
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<tr>
<td><strong>Eligible to Retire</strong></td>
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</tbody>
</table>
Changes After Retirement

- Return to work after retirement
  - With a different employer – No restrictions
  - With same employer – Annuity suspension
    - Exception: 8 year gap
    - Bona fide separation – IRS requirement

- Bona fide separation
  - No pre-arrangements
  - No pre-determined time
QUESTIONS