



Montana Teachers' Retirement System



ACTIVE MEMBERS

Benefit information and account access



BENEFIT RECIPIENTS

Handbook, forms and account access



EMPLOYERS

Account access for insurance, wages and contributions



Welcome to the new TRS website

Key Information



MASBO 2014 Conference New Account Signup

Montana Teachers' Retirement System

TRS Online Services



- ▶ TRS is in the process of upgrading all our online services.
 - ▶ TRS Website (www.trs.mt.gov)
 - ▶ May 15, 2014
 - ▶ Online Insurance Deduction System
 - ▶ August 1, 2014
 - ▶ Online Wage and Contribution Reporting System
 - ▶ Fall 2014
 - ▶ Member and Benefit Recipient System
 - ▶ 2015

TRS Online Services



▶ Employer Reporting

- ▶ In order to report in either of the new employer online systems, you must
 - ▶ Create a new account *and*
 - ▶ Complete and submit TRS Form 141
- ▶ This presentation will lead you through the account set up process.
- ▶ We will provide separate tutorials for each of the new online systems as they go live.

TRS Online Services



▶ New Account Setup

- ▶ We encourage all Employers to create a new account and complete and submit TRS Form 141 as soon as possible.
- ▶ Please be aware that:
 - ▶ If you report your TRS Insurance Deductions online, you will be able to access the new system on August 1.
- ▶ All Employers will continue to sign into the current Wage & Contribution System until the new system goes live in the Fall of 2014.
 - ▶ We will notify you via email when you can access the system.



New Account Overview



Overview

- ▶ Each employer must create a *new* account for the new TRS online services.

- ▶ The account will be associated with three levels of responsibility:
 1. Employer Representative
 2. Online Administrator
 3. Additional Users

Overview: Employer Representative



- ▶ The *Employer Representative* must be:
 - ▶ Administrative officer,
 - ▶ Trustee, or
 - ▶ Other representative who has general authority to enter into legally binding agreements on behalf of the employer
- ▶ The *Employer Representative* will designate the *Online Administrator(s)* responsible for managing reporting to TRS.
- ▶ The Employer Representative will not have direct account access for TRS reporting, unless they also serve as the Online Administrator or Additional User.

Overview: Online Administrator



- ▶ The Online Administrator is designated by the Employer Representative. The Online Administrator is:
 - ▶ The person primarily responsible for managing employer access to TRS Online Services.
 - ▶ The primary point of contact between TRS and the Employer regarding online reporting.

- ▶ The Employer may choose to designate:
 - ▶ **One person** as Online Administrator **for both** Insurance Deduction and Wage and Contribution Reporting Systems
 - ▶ **One person** for the Insurance Deduction System *and* **one other person** for the Wage and Contribution Reporting System



Overview: Additional Users

- ▶ Additional Users are designated by the Online Administrator.
 - ▶ The Online Administrator may assign additional users to access and use the TRS Online Services systems for reporting purposes.
 - ▶ The Online Administrator is responsible for training the Additional Users.
 - ▶ TRS will provide training materials on the TRS website.
 - ▶ Additional Users will create their own account and provide their user name to the Online Administrator in order to get access to the TRS employer's reporting system.
 - ▶ Online Administrators will enable the account for Additional Users after the new systems are live.



Overview

- ▶ It is possible for an Employer to have one person in the roles of both Employer Representative and Online Administrator with no Additional Users.
- ▶ Other Employers may have separate individuals fulfilling the roles of Employer Representative and Online Administrator with multiple Additional Users.
- ▶ Only the Employer Representative has the authority to remove an Online Administrator from the reporting system and must submit a new Form 141.



TRS Form 141

Employer Designation of Administrator
for Online Employer Reporting System

Form 141: Employer Information



- ▶ The Employer must designate a Representative who will complete Section 1 of Form 141.

An employer that uses the TRS online employer reporting system(s) must designate the specific employee(s) who will be primarily responsible for online reporting to TRS (referred to as "Online Administrators") for each system. This form must be completed and signed by the designated Online Administrator, and by an authorized employer representative. *Each individual signing this form certifies that he/she has read, understands, and will comply with the information/instructions on page 2.*

Section 1 - Employer Information:

Employer Printed Name

TRS Six-Digit Employer Number

Area Code and Telephone Number

Area Code and Fax Number

Employer Mailing Address – Including City, State & Zip+4 Code (If unknown, use 5-digit Zip Code)

Form 141: Online Administrator



- ▶ The Employer Representative must designate the Online Administrator(s).
 - ▶ If the Employer will assign the Online Administrator roles to two separate individuals – two separate forms must be completed.
- ▶ You will create a new TRS User Name when signing up online.

Section 2 - Designation of Online Administrator:

For: Wage and Contribution Reporting System and/or Employer Insurance Deduction System

Printed Name of Online Administrator

Job/Position Title

Work Email Address

Work Phone Number

TRS User Name (must be at least 6 characters long)



Form 141: Signatures

- ▶ Both the Online Administrator and the Employer Representative must sign and date the form and mail to the TRS office.
- ▶ After the account has been activated, the Online Administrator will receive an email to indicate they can access the new system.

Section 3 - Signatures of Online Administrator and Employer Representative:

Signature of Online Administrator

Date

The employer representative signing this form represents that he/she is an administrative officer, a trustee, or other representative of the employer who has general authority to direct the employees of the employer or who has authority to enter into legally binding agreements on behalf of the employer.

Printed Name of Employer Representative

Title

Signature of Employer Representative

Date



New User Account Setup

TRS Employer Online Services

www.trs.mt.gov

TRS Online Services



- ▶ **All Employers must create a new account** in order to access the new online services reporting systems.

- ▶ Employer Insurance Deduction System
 - ▶ Live on August 1, 2014

- ▶ Employer Wage and Contribution System
 - ▶ Live in Fall 2014

- ▶ Member and Benefit Recipient System
 - ▶ Live in 2015



New User Account Creation

- ▶ On the Employer page of the TRS website, you will see a new section that directs you to the Employer Account Setup Page.
- ▶ After reading the overview and instructions, you will find links to download pdf files:
 - ▶ TRS Form 141
 - ▶ Instructions on How To Create an Online Account
 - ▶ Employer New Account Signup (this presentation)
- ▶ You will also find a link to a new webpage where you will fill in the appropriate information to set up your new online account.

User Name and Password



Create Account

Important: Username must be at least 6 characters long and must contain at least 1 letter. Do NOT use your employer number or social security number as part of your Username. Password must be at least 8 characters long, must use both letters and numbers, and is case-sensitive. Password must be different than your username. Passwords expire every 6 months.

- ▶ Username Instructions
 - ▶ 6 character minimum length
 - ▶ At least 1 letter (A-Z)
 - ▶ Do not use your employer number or social security number
- ▶ Password Instructions
 - ▶ 8 character minimum length
 - ▶ Must include both numbers and letters – case sensitive
 - ▶ Will expire every 6 months



Contact Information

- ▶ We encourage you to use your school/employer email – unless you do not have one.

Personal Information

*First Name

Middle Name

*Last Name

*Phone Number / Ext
406 -

*Email

*Confirm Email





Username and Password

- ▶ TRS will have access to your password hint, but not to your password.

ID Details

*Username

*Password

*Confirm Password

*Password Hint



Security Questions

- ▶ You can create your own security question or choose from one of the options.
- ▶ If you need to request a password reset, you will receive an email with a link to reset and you will need to answer one of your security questions.

Security Information

*1. Security Question

*Your Answer

*2. Security Question

*Your Answer

*3. Security Question

*Your Answer



Account Confirmation

- ▶ After you have created your account, the system will bring you to an account confirmation page.
- ▶ The confirmation page will give you further instructions and links to resources and technical assistance from TRS staff.



Resources for Employers

TRS website

TRS staff



TRS Presentations

- ▶ **Wednesday, June 18**
 - ▶ 10:50 a.m. New Clerk Training w/ PERS
 - ▶ 3:00 p.m. TRS Online Services, Key Information

- ▶ **Thursday, June 19**
 - ▶ 11:00 a.m. TRS Online Services, Key Information
 - ▶ 3:00 p.m. New Clerk Training, TRS Online Services

- ▶ **Exhibitor Table**



TRS Website

- ▶ The TRS website is located at: www.trs.mt.gov
- ▶ The employer page has
 - ▶ News section at the top
 - ▶ Links to the online reporting systems for insurance deductions and wage & contribution reporting
 - ▶ Key information links
 - ▶ GASB changes for employer accounting
 - ▶ Employer manual
 - ▶ TRS memos
 - ▶ Legislative updates
 - ▶ Training materials
 - ▶ Forms
 - ▶ Links to statutes

TRS Staff



- ▶ Our staff members are available to help you with questions or problems that you may have.
 - ▶ Website: www.trs.mt.gov
 - ▶ Phone: (406) 444-3134 / (866) 600-4045
 - ▶ Email: trswebadmin@mt.gov
- ▶ The Contact TRS Staff page on the website has information on specific staff members who can help you address specific questions.

Questions

