Employer Access

Establishing an Account
Employee Lookup
Accounting
Annual Report
Claims

Teachers' Retirement System of the State of Illinois

Retirement Security for Illinois Educators

Establishing a Security Administrator

- Each employer must designate at least one Security Administrator for the Employer Access Area of TRS's website.
- Contact the TRS Accounting Department at (888) 678-3675, option 2 to initiate the security administrator set-up process.
- TRS will mail a User ID and an Access Code to the Security Administrator in two separate letters.
- The Security Administrator will be required to complete an annual recertification.

Adding Users

Add Profile

Name and Title
*Required information

Prefix*:	Select One ▼
First Name*:	
Middle Name:	
Last Name*:	
Suffix:	Select One ▼
Title:	

Phone Number
*Required information

Work Phone*:	(999-999-9999)
Extension:	

Email Information
*Required information

Email Address*:	
Re-enter Email Address*:	

Access Rights

Access	Menu Item
☐	Accounting
☐	Annual Report
☐	Claims
☐	Demographics
☐	Employer Services - Employee Information

Save   Cancel

- Once the Security Administrator's account has been set up, the Security Administrator can add authorized users for the district.
- The Security Administrator can give the new user access rights to all of the screens in the Employer Access Area or can choose to only authorize access to some screens.
- When the Security Administrator clicks the save button, the next screen that appears will list the new user's User ID and Access Code. The new user will need these to sign in for the first time.

Signing into the Employer Access Area
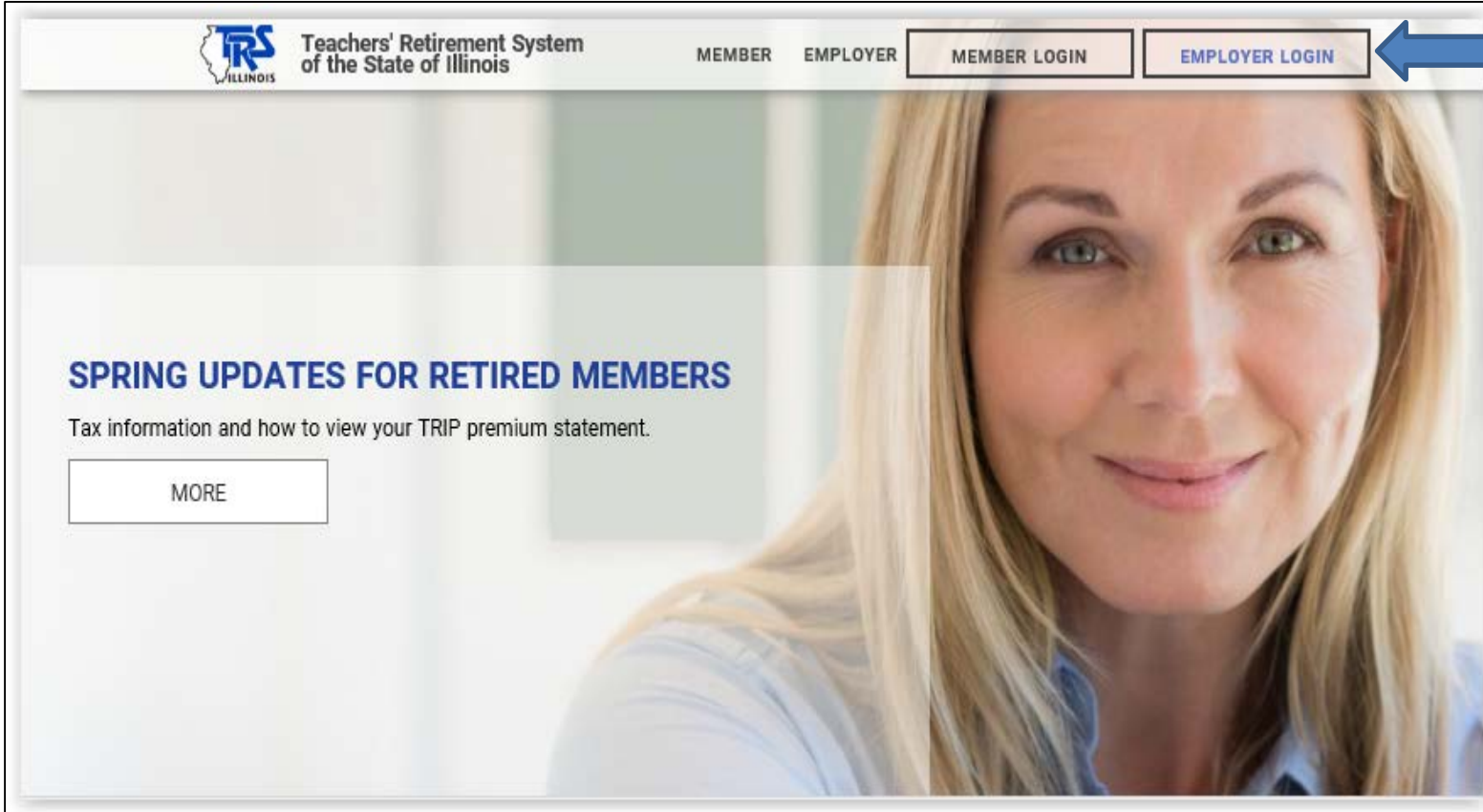
- On the TRS home page, click on the Employer Login button located in the top right section of the screen.

Employer Secure Sign In

TRS Links
TRS Main Page
Employer Access

Employer Access Area

Employer Access > Secure Sign In

Employer Secure Sign In

A user ID is required to access employer account information. If you have not yet established your account, enter your user ID and click on the "New User" button below. If you have forgotten your user ID or password, click on the "Forgot User ID/Password" button below.

The secure session will automatically end after 20 minutes of inactivity.

User ID: [   ]

[Sign In]   [New User]

[Forgot User ID/Password]

- Enter User ID.
- If you've never signed in before, click the New User button.
- If you're an established user, click the Sign In button.

Forgot User ID/Password

Employer Secure Sign In

A user ID is required to access employer account information. If you have not yet established your account, enter your user ID and click on the "New User" button below. If you have forgotten your user ID or password, click on the "Forgot User ID/Password" button below.

The secure session will automatically end after 20 minutes of inactivity.

User ID: [   ]

[Sign In]   [New User]

[Forgot User ID/Password]

Forgot User ID/Password
*Required information

Please enter the following information to verify that you are an authorized user.

Access Code*:   [   ]   What is an Access Code?

[Submit]   [Cancel]

- If you forgot your User ID or password, click on Forgot User ID/Password button.
- Enter your Access Code if you have it. If you don't have it, contact your district's Security Administrator or call TRS Employer Services at (888) 678-3675.
- Click the Submit button.

Challenge Questions and Password

Answer Challenge Question
*Required information

What was the name of your childhood best friend?

Submit   Cancel

Type Password
*Required information

(Case sensitive - Use upper and lower case letters)
Password*:

Submit   Cancel

- Answers to challenge questions are established the first time the new user signs into the Employer Access Area.
- Each time thereafter, the user must answer a challenge question to sign in.
- Enter the answer then click on Submit.
- The password screen comes up next. Enter your password and click Save.
- **Keep your password confidential.**

Employer Access Menu

Employer Access
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- My Account
- Contact Information

Employer Services
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  - Employee Lookup
  - Reports
- Accounting
  - Accounts
  - Billing
  - Online Payments
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  - Payroll Schedule
- Annual Report
  - How To Use This System
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- Claims
  - How To Use This System
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  - Revise Submitted Supp Rpts
  - Revise Submitted SL Certs
  - Reports
- Demographics
- Document Upload

Seminar
- Seminar Registration

User Accounts
- Add Profile
- Select User Profile
- Web Access Certification

Contact Information

Phone Number

Work Phone: (888) 877-0890   Extension: 2415

Update Phone Number

Email Information

Work Email Address: agreen@trs.illinois.gov

Update Email Information

- The Employer Access menu will appear on the left side of the screen.
- Your district's contact information will appear in the middle of the screen.
- Use the Update links on the Contact Information screen if any of your contact information has changed.

Customize Sign-in Information

Employer Access
- Sign Out
- My Account
- Contact Information

My Account

User ID

User ID:

Update User ID

Password

Password:

Update Password

Access Code

Access Code:

Pass Phrase

Pass Phrase

Update Pass Phrase

Image

Image:

Update Image

Challenge Questions

Challenge Question:

Challenge Question:

Challenge Question:

Update Challenge Questions

- To change your user sign-in information click on the My Account menu item.
- All information except the user's Access Code can be updated.
- If you're having difficulty remembering your User ID, password, or answers to challenge questions, customize them to something you can easily remember.
- **Keep your password confidential!**

Employee Information

Employer Access
Sign Out
My Account
Contact Information
Employer Services
Employee Information
　Employee Lookup
　Reports

Employee Lookup

Social Security Number Search

Enter the employee's nine-digit Social Security number and click the "Search by SSN" button.

[   ] (999-99-9999) [Search by SSN]

| Tier: | I |
| Retired?: | No |

Reports

Employee Tier Report (Includes both Tier I and Tier II employees)

Tier I Employee Report

Tier II Employee Report

- The Employee Information section of the menu offers two functions:
1. Employee Lookup
   - Enter the member's SSN
   - The next screen will show whether the member is in Tier 1 or Tier 2 and will indicate whether or not the member is retired.
2. Reports
   1. The user can view or print reports showing all of the members listed on the most recent TRS Annual Report and each member's Tier status.

Viewing Contribution Accounts

- Click on the Accounts menu item to view contribution balances.
- Information for the current fiscal year will be displayed.
- To view a prior year, select the year in the Fiscal Year dropdown box, then click Search Contribution Accounts.

Contribution Accounts

Contribution Accounts

Fiscal Year: 2017-18 [Search Contribution Accounts]

	Account	Current Balance
Details	Contrib - Empl 2.2 MBI	(126,732.32)
Details	Contrib - Fed Fund	(9,224.49)
Details	Contrib - Member Ret	(1,966,489.12)
Details	Contrib - THIS Fund	(450,110.05)

- The Contribution Accounts section displays each of the regular pay period remittance accounts and the total remitted in each account so far for the year.
- To view each individual transaction in an account, click the Details link.

Account Details

Account Details

Account:	Contrib - Member Ret
Fiscal Year:	2017-18
Current Balance:	(1,966,489.12)
To-date Payments:	1,966,489.12

Transactions

Transactions prior to 7/1/2003 are not available online.
○ Include all transactions.
◉ Include all transactions from: 7/1/2017 to: 6/30/2018 .
(mm/dd/yyyy) (mm/dd/yyyy).

[Search]

	Date	Activity	Amount
Details	01/10/2018	Cash Receipt	(5,852.99)
Details	12/22/2017	Cash Receipt	(495,511.19)
Details	12/08/2017	Cash Receipt	(4,635.17)
Details	11/24/2017	Cash Receipt	(438,092.53)
Details	11/09/2017	Cash Receipt	(3,854.92)
Details	10/25/2017	Cash Receipt	(436,923.58)
Details	10/10/2017	Cash Receipt	(13,633.22)
Details	09/25/2017	Cash Receipt	(435,951.80)
Details	09/08/2017	Cash Receipt	(483.25)
Details	08/25/2017	Cash Receipt	(78,761.53)
Details	08/10/2017	Cash Receipt	(691.67)
Details	07/25/2017	Cash Receipt	(52,097.27)

- The Account Details screen displays each individual transaction for the fiscal year.
- The screen can be filtered to display specific date ranges.
- To view additional information for a specific transaction, click the Details link next to the date. The pay period number and reference number for that transaction will be displayed.

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Billed Employer Accounts

Billed Employer Accounts

Fiscal Year: 2017-18 ☑   Search Billed Employer Accounts

	Account	Current Balance
Details	ATE Contrib - Empl 2.2 MBI	896.46
Details	ATE Contrib - Member Ret	33,205.56
Details	ATE Contrib - THIS Fund	5,253.30

Report difference billed amounts are reflected in the appropriate fiscal year contribution account.

- Total amounts paid for billed items are displayed in the Billed Employer Accounts section of the Accounts screen.
- Types of costs displayed in this section include contributions for Adjustments to Earnings (ATEs) and late payment penalties.
- Click the Details link to view a list of the individual transactions.

Billed Member Accounts

	Account
Details	Contrib - ERO Employer
Details	Contrib - Excess Salary Increase
Details	Contrib - Excess Sick Leave

- Retirement costs paid by the employer for specific members are displayed in the Billed Member Accounts section of the Accounts screen.
- Retirement costs may include:
  - Excess Salary Increase costs for retiring members who were paid more than a 6% raise in their final years of service.
  - Excess Sick Leave costs for retiring members who were given extra sick leave days in their final 4 years of service.
  - Employer costs for any members whose earnings were over the governor's statutory salary.
- Click the Details link to view a list of the individual transactions.

List of Monthly Bills

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  - Billing

Billing

Click here for help in processing an Employer Bill.

Fiscal Year: 2017-18   Search

	Invoice Number	Bill Date
Details	231366	03/25/2018
Details	230374	01/25/2018
Details	229381	12/25/2017
Details	228389	11/25/2017
Details	227397	10/25/2017
Details	226404	09/25/2017
Details	225411	08/25/2017
Details	224418	07/25/2017
Details	223427	06/25/2017

- On the 25th of each month, TRS bills the employer for any costs due other than the regular pay period remittances.
- To view the monthly bills, click on the Billing menu item.
- The current year's bills will appear on the screen. Use the Fiscal Year dropdown box to access prior year bills.
- Click the Details link to view the bill for a specific month.

Monthly Bill Details

Bill Details

Fiscal Year:	2017-18
Invoice Number:	231366
Billing Month:	04/2018
Bill Date:	03/25/2018
Total Amount Billed:	269,154.82
Total Amount Remitted:	

Bill Sections

The amount remitted does not include pending transactions. A payment is pending until the applicable deposit is processed by the TRS Accounting Department.

TRS Bill Sections

	Bill Section Number / Name	Amount Billed	Revised Amount	Amount Remitted	Debit Date
Details	20 - Employer Retirement Costs	4,811.67			
	30 - Penalties/Other	0.00			
Details	40 - Adjustments to Earnings	34,102.02			
	50 - Report Difference Contributions	0.00			

THIS Fund Bill Sections

	Bill Section Number / Name	Amount Billed	Revised Amount	Amount Remitted	Debit Date
Details	25 - Employer Pay Insurance - THIS Fund	224,987.83			
Details	45 - Adjustments to Earnings - THIS Fund	5,253.30			
	55 - Report Difference Contributions - THIS Fund	0.00			

When making an online payment, the invoice number, bill section number and payment amount are required fields.

Online Payments   Back

- The invoice number and the total amount due will be displayed in the top section of the Bill Details screen.

- The bill section number will be listed and the description for each type of cost.

- The Bill Details screen has separate sections for TRS costs and THIS costs.

- To pay the billed item, click the Online Payments button on the Bill Details screen or the Online Payments menu item.

Online Payments

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Please enter your Log On Information.
Don't have a Username and Password?
Select "New User" link below and enter your Employer Number and PIN sent to you by mail to create your Username and Password. If you have difficulties accessing the system, please contact Customer Service at 1-800-332-4125.

Welcome to Illinois Teachers' Retirement System

Please enter your Log On Information.
Don't have a Username and Password? Select "New User" link below and enter your Employer Number and PIN sent to you by mail to create your Username and Password. If you have difficulties accessing the system, please contact Customer Service at 1-800-332-4125.

Username:

Password:

Log In

Forgot Password?

New User? Register your Employer Number.

- The Online Payments menu item takes the user to the Electronic Funds Transfer System.

- Enter the district's Username and Password.

- Click the Log In button.

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Remittance Options

Member and Employer Contribution
Teachers' Health Insurance Contribution
TRS Remittance Payment
THIS Fund Remittance Payment

- Select the 1st option (Member and Employer Contribution) to remit regular pay period TRS contributions, then follow the prompts.

- Select the 2nd option (Teachers' Health Insurance Contribution) to remit regular pay period THIS contributions, then follow the prompts.

- Select the 3rd option (TRS Remittance Payment) to remit billed TRS items. These costs include ATE contributions, penalties, retirement costs, and cost for salary in excess of the governor's salary.

- Select the 4th option (THIS Fund Remittance Payment) to remit billed THIS items. These costs include ATE contributions, penalties, and employer payments for retired teachers' insurance premiums.

Accounting Reports

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Reports

Billed Employer Account Reports

Billed Member Account Reports

Contribution Account Reports

Employer Bill

Fiscal Year Contribution Totals Report 📄 (available April 1 - December 31)

GASB 68 FY16 Disclosure Report 📄 (available April 1 - December 31)

Pay Period Schedule Report 📄

Teachers' Retirement Insurance Program (TRIP) Rates 📄

- Click on the Reports menu item to view or print a variety of reports in PDF format, including:
  - Account Transaction Reports for billed items.
  - Account Transaction Reports for regular pay period contribution accounts.
  - Monthly bills
- Each district's outside auditors will need copies of the following reports:
  - Fiscal Year Contribution Totals Report, and
  - GASB 68 Disclosure Report

Payroll Schedule

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- Contact Information

Employer Services
- Employee Information
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- Accounting
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  - Billing
  - Online Payments
  - Reports
  - Payroll Schedule

Payroll Schedule

School Year: 2017-18 ▼ [Select]

	1st Pay	2nd Pay	3rd Pay	4th Pay	5th Pay
July:	14	28			
August:	11	25			
September:	08	22			
October:	06	20			
November:	03	17			
December:	01	15	29		
January:	12	26			
February:	09	23			
March:	09	23			
April:	06	20			
May:	04	18			
June:	01	15	29		

Pay Period Schedule Report 📄

Please contact the Accounting Department at (888) 678-3675, option 2 or employers@trsil.org if changes are necessary.

- Each April, employers must provide TRS with their payroll dates for the next fiscal year.

- Click on the Payroll Schedule menu item.

- Enter each pay date for the upcoming year.

Pay Period Schedule Report

District Payroll Date	Payment Due Date	EFT Option	Fiscal Year	Pay Period	Member TRS Contributions	Employer Federal Funds Contributions	Employer Contributions for Member Benefit Increase	THIS Fund Contributions	Total	Debit Date	Reference Number
07/14/17	07/25/17	1	2018	01							
		2									
07/28/17	08/10/17	1	2018	02							
		2									
08/11/17	08/25/17	1	2018	03							
		2									
08/25/17	09/10/17	1	2018	04							
		2									

- Once the payroll dates for the upcoming year have been entered, the user can click on the Pay Period Schedule Report link or the Reports menu item to print out the report.

- The Pay Period Schedule Report may be used to record and track each remittance throughout the year.

Annual Report

- The items in the Annual Report section of the menu are used to complete and submit the Annual Report of Earnings.

- The Annual Report must be submitted to TRS by August 15 each year.

- Refer to the Annual Report Tutorial web presentation and Chapter 5 of the TRS *Employer Guide* for detailed instructions on completing the Annual Report.

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Remittances
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Reports
Submit to TRS
Confirm Sum of Changes

- Briefly explains each of the menu items under the "Annual Report" section.

- Provides a link to view or print a list of **TRS edit codes** with descriptions and required actions. ***This list can be very helpful!***

Import/Recover/Delete

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  Reports
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  Confirm Sum of Changes

Import/Recover/Delete allows the user to:
- Import data from an employer file.
- Recover data from the prior year's Annual Report.
- Delete earnings information.
- Delete all employees from the Annual Report.

Employee List

- The Employee List displays the name and SSN for every person entered on the Annual Report.

- Shows if any edit codes invoked for the member.

- **Has a link to the Update screen for each member.**

Add Employee

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Confirm Sum of Changes

- After the initial import or recover process has been done, use the Add Employee menu item to add any additional members to the Annual Report.

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Remittances

- The Remittances menu item takes the user to the entry screen for total contributions remitted during the year.

- Used in the contribution balancing process.

Compliance Questionnaire

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- The Compliance Questionnaire menu item links to a series of questions about the district's practices.

- Must be completed before the Annual Report can be submitted.

Reports

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  - Reports
  - Submit to TRS
  - Confirm Sum of Changes

- After entry is complete, use the Reports menu item to view the results.

- Reports are in Adobe Acrobat PDF format and can be printed.

Submit to TRS

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Submit to TRS
Confirm Sum of Changes

- The Submit to TRS menu item is used to send the completed Annual Report to TRS.

Confirm Summary of Changes

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Submit to TRS
Confirm Sum of Changes

- After the Annual Report has been audited by TRS, the district must use the Confirm Summary of Changes menu item to verify they have reviewed the changes made during the audit process.

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Claims Section of the Menu

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Claims
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  Supp Rpts/Sick Leave Certs
  Revise Submitted Supp Rpts
  Revise Submitted SL Certs
  Reports

- Items in the Claims section of the menu are used to complete/submit or revise/submit Supplementary Reports for members who have applied for TRS benefits.

- For retiring members, a Sick Leave Certification will be included with the Supplementary Report.

- TRS sends an email notification to the employer when a new Supplementary Report is added to the employer's list.

- The Supplementary Report cannot be submitted to TRS before the member's last day but should be completed and submitted soon after the member's last day.

- Refer to the Supplementary Report tutorial presentation and Chapter 5 of the TRS *Employer Guide* for detailed instructions on completing the Supplementary Report and Sick Leave Certification.

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- Briefly explains each of the menu items in the "Claims" section.

- Provides a link to the TRS *Employer Guide*.

- Provides a link to view or print a list of **TRS edit codes** that apply to Supplementary Reports and Sick Leave Certifications.
  - This list includes a description and required actions for each edit code. **This list can be very helpful!**

Supplementary Reports & Sick Leave Certifications

- Click on the Supp Rpts/Sick Leave Certs menu item to bring up the list of members with Supplementary Reports and/or Sick Leave Certifications awaiting completion.

- Click on the Update link to complete the form(s).

- If you need assistance completing the forms:

  - Refer to Chapter 5 in the TRS *Employer Guide*.

  - Refer to the Supplementary Report tutorial on the TRS website.

  - Call Employer Services Department at (888) 678-3675 to speak with an Auditor or email at employers@trsil.org.

Correcting a Submitted Report

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- If an error is discovered, or if there is a change to the member's earnings and/or service information after the report has already been submitted to TRS, use the Revise menu options to submit corrections.

- Click on the Revise Submitted Supp Rpts menu item to submit corrections to a member's Supplementary Report.

- Click on the Revise Submitted SL Certs menu item to submit corrections to a member's Sick Leave Certification.

Printing Supplementary Reports & Sick Leave Certifications

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  Revise Submitted Supp Rpts
  Revise Submitted SL Certs
  Reports

Reports

Sick Leave Certifications

Supplementary Reports

Filter Sick Leave Certifications

Choose one of the following options:

○ Include all Sick Leave Certifications submitted
from: [   ] to: [   ].
(mm/dd/yyyy)   (mm/dd/yyyy)

○ Include Sick Leave Certification for SSN: [   ]. (999-99-9999)

[OK] [Cancel]

- Click on the Reports menu item to print copies of Supplementary Reports and Sick Leave Certifications.

- The user may choose to print all reports submitted during a specified date range, or may print the report for a specific member.

Updating Employer Demographic Information

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Revise Submitted Supp Rpts
Revise Submitted SL Certs
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Demographics
User Accounts
Add Profile
Select User Profile
Web Access Certification

- Click on the Demographics menu item to update the following information for your district:

  - Mailing address

  - Phone number or email address for the designated district contacts.

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Adding a New User

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Revise Submitted Supp Rpts
Revise Submitted SL Certs
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User Accounts
Add Profile
Select User Profile
Web Access Certification

- The Add Profile menu item is used by the district's Security Administrator to add a new user and give him/her access rights to the Employer Access Area.

Unlocking a User's Access Account

Employer Access
Sign Out
My Account
Contact Information
Employer Services
Employee Information
Employee Lookup
Reports
Accounting
Accounts
Billing
Online Payments
Reports
Payroll Schedule
Annual Report
How To Use This System
Import/Recover/Delete
Employee List
Add Employee
Remittances
Compliance Questionnaire
Reports
Submit to TRS
Confirm Sum of Changes
Claims
How To Use This System
Supp Rpts/Sick Leave Certs
Revise Submitted Supp Rpts
Revise Submitted SL Certs
Reports
Demographics
User Accounts
Add Profile
Select User Profile
Web Access Certification

- Employer Access Area users should log in at least once every 35 days.

- After 35 days of inactivity, the user's account will be locked.

- The district's Security Administrator can click on the Select User Profile menu item to unlock a user's account.

- The Security Administrator can also update the user's contact information and access rights.

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Web Access Certification

- Once a year, TRS will ask the district's Security Administrator to click on the Web Access Certification menu item and complete the certification form.

Document Upload

- Use the Document Upload feature to securely send documents to TRS.

Seminar Registration

Employer Access
Sign Out
My Account
Contact Information
Employer Services
Employee Information
Employee Lookup
Reports
Accounting
Accounts
Billing
Online Payments
Reports
Payroll Schedule
Annual Report
How To Use This System
Import/Recover/Delete
Employee List
Add Employee
Remittances
Compliance Questionnaire
Reports
Submit to TRS
Confirm Sum of Changes
Claims
How To Use This System
Supp Rpts/Sick Leave Certs
Revise Submitted Supp Rpts
Revise Submitted SL Certs
Reports
Demographics
Document Upload
Seminar
Seminar Registration
User Accounts
Add Profile
Select User Profile
Web Access Certification

- TRS will notify employers of upcoming seminars. Use this feature to register for seminars.

Conclusion

- Chapters 4 and 8 of the TRS *Employer Guide* have more information about contributions, employer costs, and accounting reports.

- Chapter 5 of the TRS *Employer Guide* has more information about completing the Annual Report of Earnings, Supplementary Reports, and Sick Leave Certifications.

- Feel free to call TRS Employer Services at (888) 678-3675 with any questions about using the Employer Access Area.

- Questions can be emailed to employers@trsil.org.