VII. Employer Portal

1. Employer Responsibility

a. It is the responsibility of employers to accurately report member information and contributions to TRS through the Employer Portal within the appropriate timelines.

2. Employer Portal

a. The Employer Portal is the key component to communication between employers and TRS. All reports and submissions are made through the portal. In addition, the Portal is a useful source of information for employers.

3. Web Browser

a. The TRS Employer Portal supports the following web browsers

i. Internet Explorer 10+
ii. Fire Fox 31+
iii. Chrome 36+
iv. Safari 5+

4. User Account

a. Every user must have an individual user account

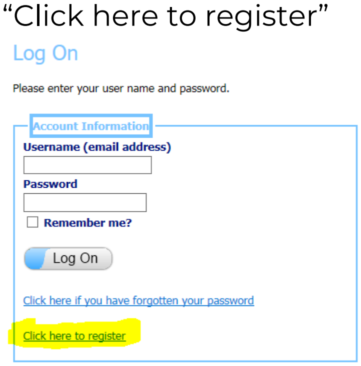
i. Only the person registered for the account can use the account.
ii. Never allow employees to use the account of another employee.

b. Employer approval

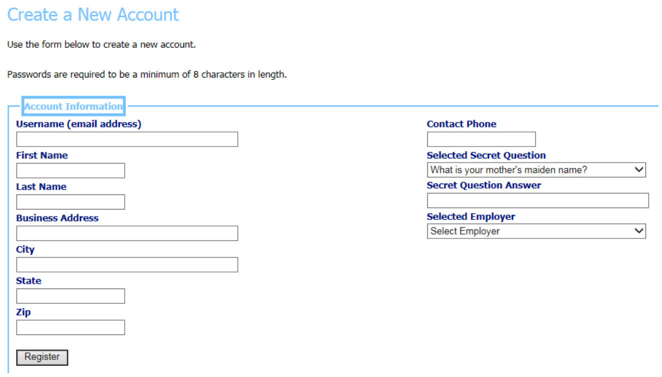
i. Prior to registering for the Employer Portal, an employee who is already a contact for that employer must notify TRS that a new user will be applying for an account.

c. Open the Employer Portal using this link, https://mas.trs.ok.gov/Account/Logon The Portal may also be accessed from the TRS website (https://oklahoma.gov/trs.html) on the Employer Tab by clicking "Employer Portal."

d. "Click here to register"



e. Complete information as requested



Create a New Account

Use the form below to create a new account.

Passwords are required to be a minimum of 8 characters in length.

Account Information

Username (email address)

First Name

Last Name

Business Address

City

State

Zip

Register

Contact Phone

Selected Secret Question

What is your mother's maiden name?

Secret Question Answer

Selected Employer

Select Employer

i. Username: email address of the individual registering for an account. If the user accesses multiple employers, a different email username with a different email address must be set up for each employer.
ii. First Name and Last Name: name of individual registering
iii. Business Address, City, State, and Zip: employer mailing address
iv. Contact Phone: contact phone number (including extension if applicable) for individual registering
v. Secret Question: use dropdown menu to select a question. This will be used if the password is forgotten or needs to be reset.
vi. Secret Question Answer: personalized answer to question
vii. Selected Employer: use dropdown menu to select the employer. If user must log into more than one employer, separate user names must be used for each employer.

f. Register: click button when all information has been entered

g. Confirmation email will be sent. Click the "Confirm Registration" link

From: noreply@trs.ok.gov

Sent: Mon 3/21/2016 4:34 PM

To: Debra Plog

Cc:

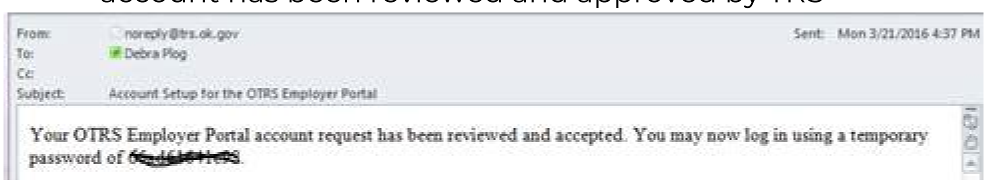
Subject: Registration Confirmation for the OTRS Employer Portal

Please click the following link to confirm your OTRS Employer Portal registration: Confirm Registration

i. If the email is not received
ii. Check the Spam or Junk folder. Security settings, in some cases, will not allow the confirmation email to be received.
iii. Contact the Employer Reporting Helpdesk at 405-522-3130 or at helpdesk@trs.ok.gov for assistance.

h. Confirm Registration by entering code from confirmation email

i. Temporary Password
   i. An email will be sent with a temporary password once the new account has been reviewed and approved by TRS



   ii. Go to the Log In page and enter the user name (email address) and temporary password. Click Log On.
   iii. Create a new personalized password which is at least eight characters in length and contains at least one capital letter, one special character, and one number.

j. Forgotten Password
   i. "Click here if you have forgotten your password". An email will be sent with a new temporary password. Follow instruction above to reset personal password. It is not necessary to reset or answer the Secret Question.
   ii. Problems? Contact the Employer Reporting Helpdesk at 405-522-3130 or helpdesk@trs.ok.gov.

5. Log On

a. Never use the personal account of another employee
b. Never allow someone else to use your account
c. After successfully creating a personalized user account, open the Employer Portal using this link, https://mas.trs.ok.gov/Account/LogOn. The Portal may also be accessed from the TRS website, (https://oklahoma.gov/trs.html) on the Employer Tab by clicking Employer Portal.
d. Enter username (email address)
e. Click Log On

f. Forgotten Password
   i. "Click here if you have forgotten your password". An email will be sent with a temporary password. Reset personal password. It is not necessary to reset the Secret Question.

6. Tabs

a. Home
   i. The Home Dashboard gives an overview of the status of contributions, yearly reports and ERV requirements.
   ii. Employment Year
      1. The employment year to be viewed is designated using the drop-down menu.
      2. The employment year set on the Home Dashboard does not determine the employment year of monthly or yearly reports which are uploaded on other tabs.
   iii. Contribution Overview
      1. The large shaded box in the center of the Home Dashboard is a month-by-month overview of all contributions paid in the designated employment year and month regardless of the submission date.
      2. If two separate submissions are made for one month, the two submissions will be added together and show as one total for that month.
      3. The list of contributions is very helpful when determining that all monthly contributions as well as any adjustments have been made correctly.
      4. If contributions are missing, a warning will appear to call attention to the overview.
   iv. Tax Form Box
      1. View status of the yearly Tax Form report for the designated year.
      2. To view the status of a different year, use the drop-down employment year box to designate the desired year.
      3. The report can be viewed by clicking the confirmation number.
   v. Employment Year End Report Box
      1. View status of the yearly Employment Year End Report for the designated year
      2. To view the status of a different year, use the drop-down employment year box to designate the desired year
      3. The report can be viewed and/or corrected by clicking the confirmation number

vi. Retirement Verification Boxes
    1. View approaching ERV deadlines
vii. Submission Overview Box
    1. View all monthly contribution reports which have been submitted to TRS
    2. The last 5 monthly submission will be listed on the home Dashboard
    3. To view all reports click View All
    4. If more than one month is included in the submission, the month will list "multiple" rather than an individual month.
viii. Contact Information Box
    1. View current contact information of all contacts
    2. Additional contacts can be added by clicking the Add button
    3. If contact information changes, contact the helpdesk at 405-522-3130 or helpdesk@trs.ok.gov
    4. If a user terminates employment or will no longer use their personal account, notify TRS immediately so the account can be deactivated. Do not allow a new employee to use the account of a previous employee.

b. Monthly
    i. All monthly submission reports, monthly adjustments and requests for refunds are submitted on the Monthly tab
    ii. All contributions in the report must be from the same employment year unless approved by TRS before submission
    iii. Detailed instructions are available in the section titled "Monthly Contribution Report".

c. Tax Forms
    i. Upload and submit yearly tax forms report
    ii. See Yearly Tax Forms report for details

d. Employment Year End
    i. Upload and submit Employment Year End report
    ii. See Employment Year End report for details

e. Retirement Verification
    i. Completion of ERV1 and ERV2
    ii. See Retirement Verification for details

f. Reports (Information provided by TRS)
    i. Informational reports for employer use
    ii. Reports produced in Excel format
    iii. If reports cannot be viewed, use a different internet browser
    iv. Report types
        1. Employment Year Overview by member
            a. Report gives employee-by-employee total of contributions and information reported for each employment year beginning with 2012
            b. To create a report, select the report name and the desired year and click Create Report
            c. Open or save in Excel format
        2. OTRS Contributions by Member and Employment Year
            a. Report gives detailed monthly contributions for one employee for one employment year
            b. After selecting the report name, enter the tax number (social security number without dashes) and the desired year
            c. Click Create report
            d. Open or save in Excel format
        3. Member Details by Tax Number
            a. Report gives status for one employee.
            b. It will list the current membership status (i.e. active, retired, withdrawn, opted out), as well as the date and employer of the most recent contribution when applicable.
        4. Service Credit
            a. View Employment Year End Report information as submitted including awarded service credit

7. Summary of Report Types

a. Monthly Contribution Report
    i. Submitted each month for contributions paid to TRS on behalf of clients
    ii. Reports are due on the 10th of the month following the pay period (month the work was performed).

b. Adjustment Report
    i. Submitted on the monthly tab to make contribution corrections.

c. Annual Calendar Year Tax Report
    i. List of calendar year earnings for all employees due April 1

d. Employment Year End Report
    i. Submitted between July 1 and November 1 for the prior employment year to verify correct compensation and service credit
e. Employer Retirement Verification (ERV)
    i. Submitted for employees who are retiring to verify final year compensation, service credit and sick leave