

GP4: Accessing employee records and updating employment history

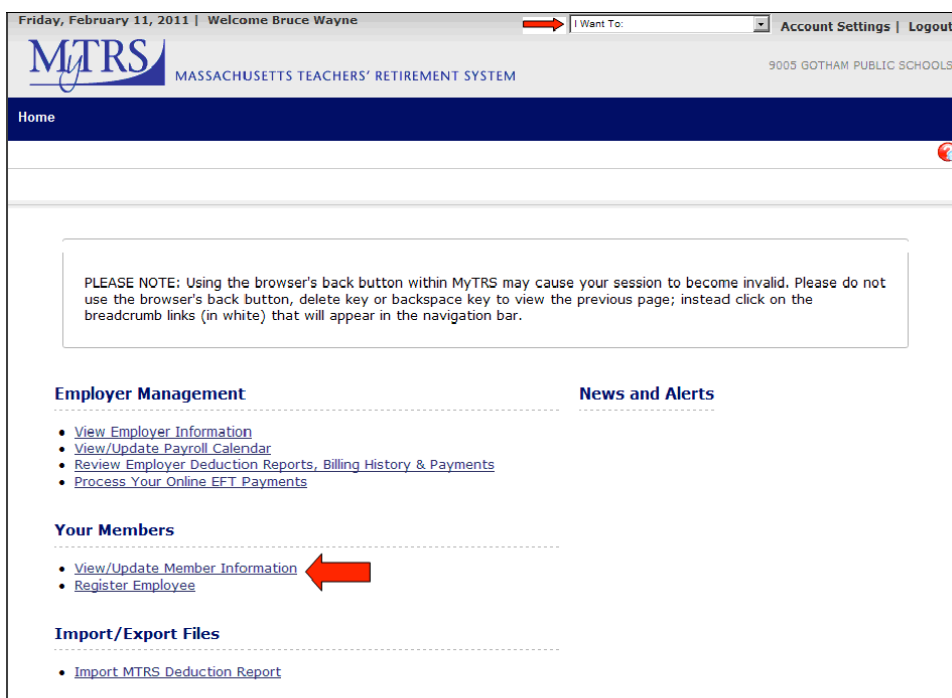
In this guided practice, you will learn how to:

- search for a member (employee),
- search for all employees,
- view demographic information,
- understand work history events,
- set an employee to a non-pay / deduction status,
- correct a termination event,
- set an employee to a partially paid leave status and
- restore a member to a fully paid status.

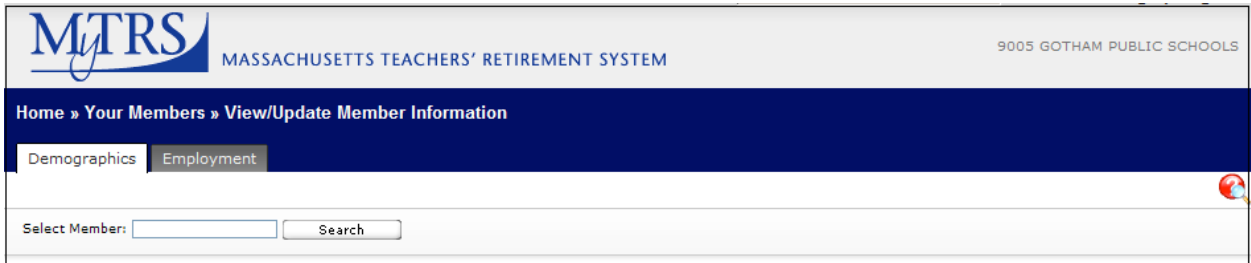
Searching for a member (employee)

MyTRS provides employers with limited access to their employees' accounts. Employers can only access accounts for their employees; they cannot access employee history with other districts.

- 1) From the MyTRS homepage, choose **View/Update Member Information** from the main menu or from the **I want to:** pull-down menu.



- 2) The *View/Update Member Information* window contains two tabs: *Demographics* and *Employment*. The *Demographics* tab displays by default. Enter all or part of the employee's last name or Social Security number in the **Select Member** search field and click **Search**.



MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

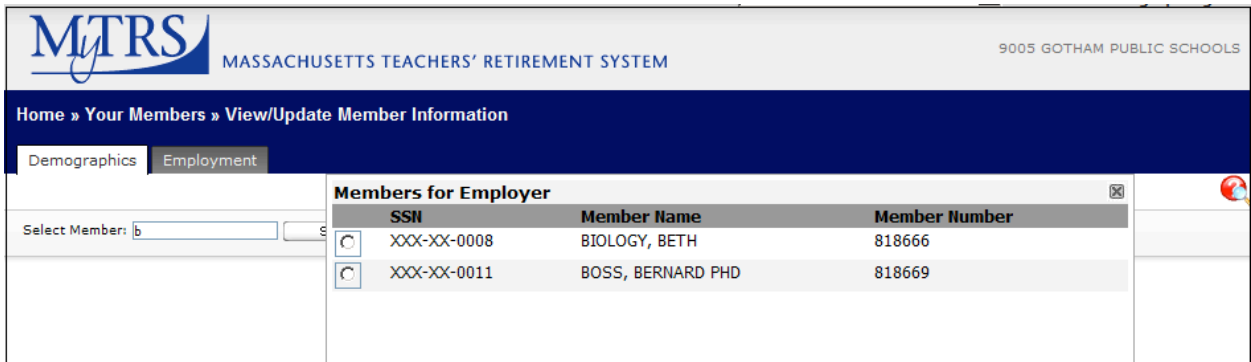
Home » Your Members » View/Update Member Information

Demographics Employment

Select Member: Search

If your search locates:

- a single record, MyTRS automatically opens the *Demographics* tab for that employee.
- multiple records, the results appear in the *Members for Employer* window, which displays the last four digits of the employee's **SSN** (Social Security number), the **Member Name**, and the MyTRS-assigned **Member Number**. Only employees who are currently working or have worked for your employer appear.



MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

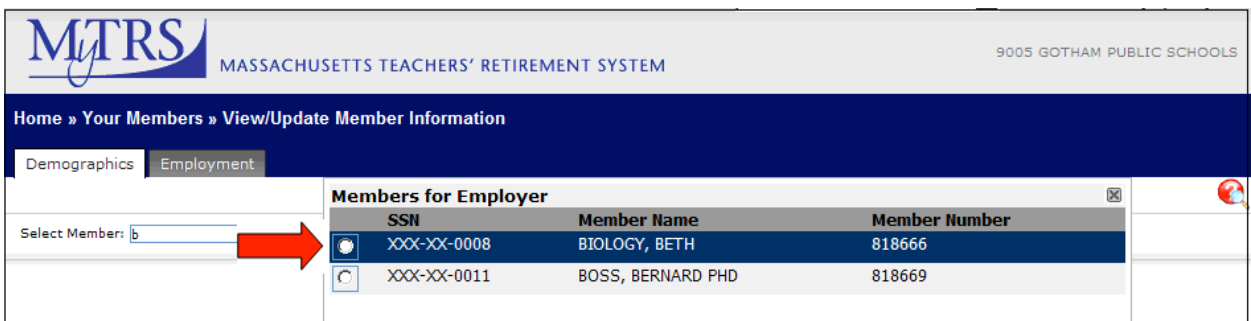
Demographics Employment

Select Member: b Search

Members for Employer		
SSN	Member Name	Member Number
<input type="radio"/> XXX-XX-0008	BIOLOGY, BETH	818666
<input type="radio"/> XXX-XX-0011	BOSS, BERNARD PHD	818669

If more than 10 records are listed, use the side scroll bar and the arrows at the bottom of the page to view the remaining records. (Refer to [Search for all Employees](#) for information on using the navigation icons to move through the pages of employee names.)

- 3) Click the radio button next to the employee's name whose record you wish to view.



MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

Demographics Employment

Select Member: b Search

Members for Employer		
SSN	Member Name	Member Number
<input checked="" type="radio"/> XXX-XX-0008	BIOLOGY, BETH	818666
<input type="radio"/> XXX-XX-0011	BOSS, BERNARD PHD	818669

The employee's *Demographics* tab appears. To access your employee's Employment information, click on the *Employment* tab (details on the *Employment* tab are listed in [Viewing Employment Information](#)).

MyTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: BIOLOGY, BETH (New Search) SSN: XXX-XX-0008

Member Information

SSN:	Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
XXX-XX-0008	Mrs.	Beth		Biology	

Additional Information

Retirement Date: / /

Note Once you have searched for an employee, the *View/Update Member Information* tab will open to that employee's account until you log out of MyTRS. If you would like to search for an employee after you have an account open, click **New Search** to display the search field.

- 4) To search for a new employee when an employee is on the screen, click **New Search** to start a new search. This link is only available when you have employee information on the window. The search field appears in place of the existing employee's name.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: BIOLOGY, BETH (New Search) SSN: XXX-XX-0008

Member Information

SSN:	Prefix:
XXX-XX-0008	Mrs.

Home » Your Members » View/Update Member Information

Demographics Employment

Select Member: Search Cancel

Member Information

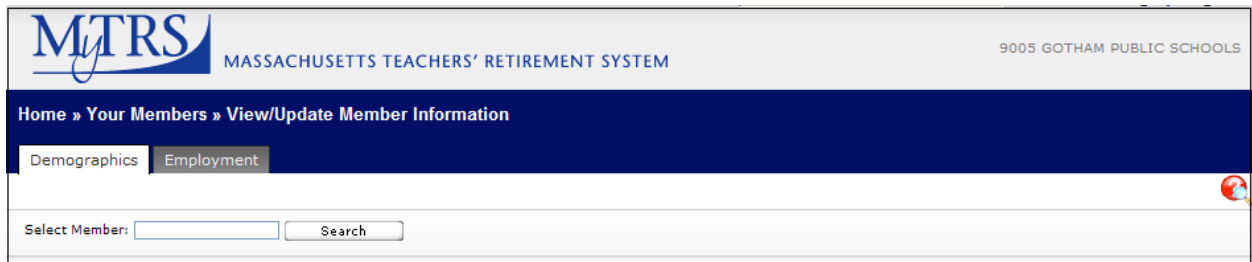
Search for all Employees

You can search for entire list of current and former MTRS eligible employees within your employer using the *Demographics* and *Employment* search fields.

Note Remember, you can only retrieve employees who currently work for or have worked for your employer.

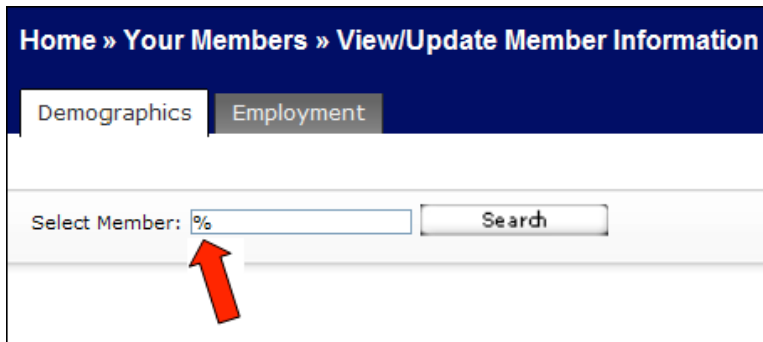
Note MyTRS saves your prior search criteria. This is only cleared when you log out of MyTRS. If you searched for employees previously during your MyTRS session, click **New Search** to display the search field.

- 1) Navigate to the *View/Update Member Information* window. The *Demographics* tab is the default. You can also perform a search for your employees from the *Employment* tab.



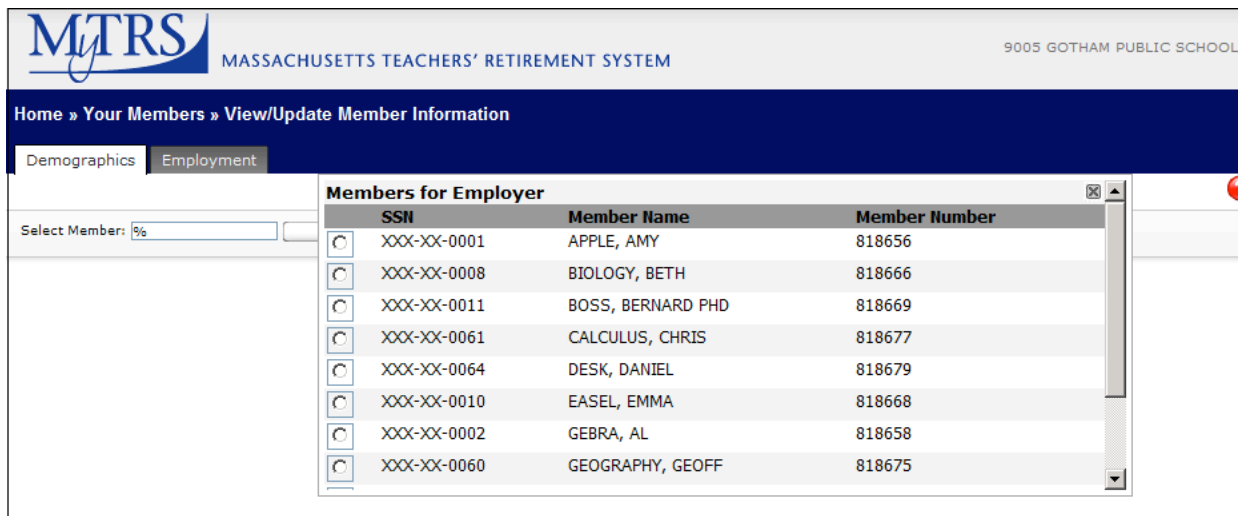
The screenshot shows the MTRS (Massachusetts Teachers' Retirement System) web interface. The header includes the MTRS logo and the text "MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM" and "9005 GOTHAM PUBLIC SCHOOLS". The breadcrumb trail is "Home » Your Members » View/Update Member Information". Below this, there are two tabs: "Demographics" (selected) and "Employment". Under the "Demographics" tab, there is a "Select Member:" text box and a "Search" button.

- 2) Enter "%" (percentage sign) in the **Select Member** field to search for all your employer's employees in MyTRS.



This is a close-up of the "Select Member:" text box from the previous screenshot. The text box now contains the percentage sign (%). A red arrow points to the text box. The "Search" button is still visible to the right of the text box.

- 3) Click **Search**. The *Members for Employer* pop-up window displays the first 10 names found.



MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

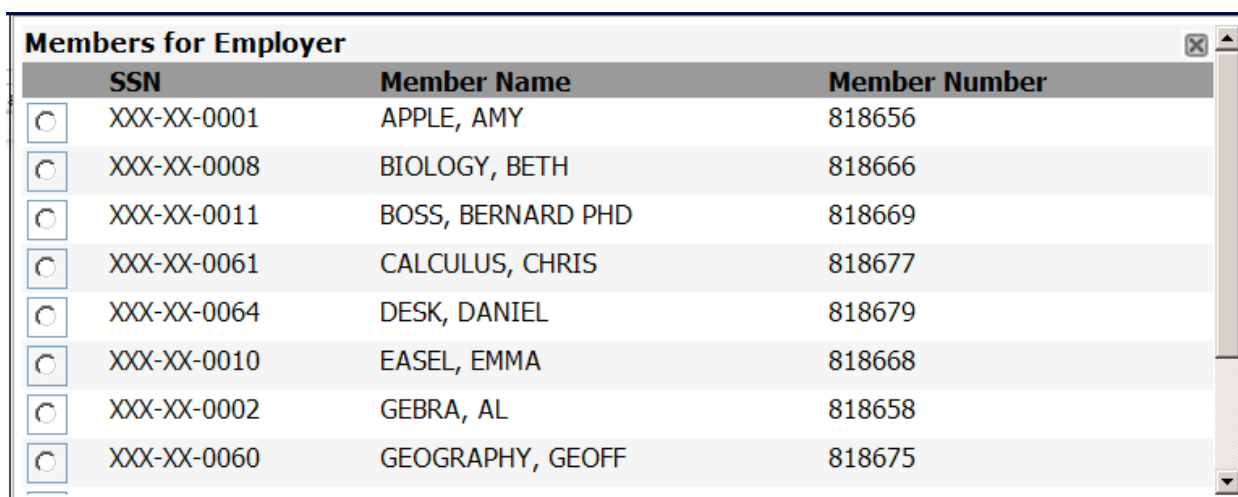
Demographics Employment

Select Member: %

Members for Employer

SSN	Member Name	Member Number
XXX-XX-0001	APPLE, AMY	818656
XXX-XX-0008	BIOLOGY, BETH	818666
XXX-XX-0011	BOSS, BERNARD PHD	818669
XXX-XX-0061	CALCULUS, CHRIS	818677
XXX-XX-0064	DESK, DANIEL	818679
XXX-XX-0010	EASEL, EMMA	818668
XXX-XX-0002	GEBRA, AL	818658
XXX-XX-0060	GEOGRAPHY, GEOFF	818675

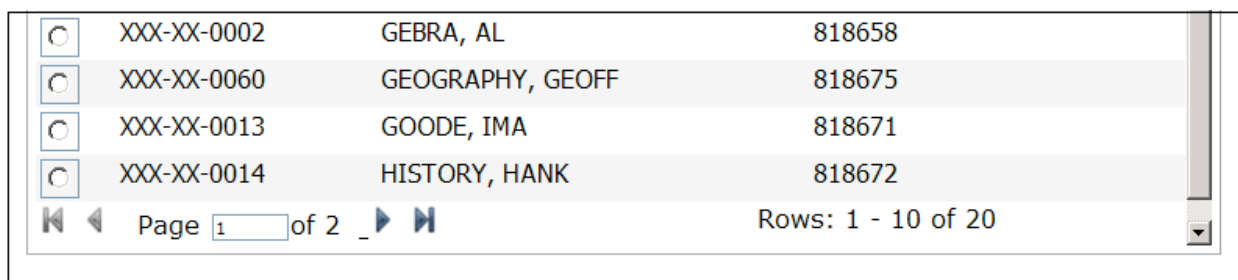
- 4) Scroll to the bottom of the window.



Members for Employer

SSN	Member Name	Member Number
XXX-XX-0001	APPLE, AMY	818656
XXX-XX-0008	BIOLOGY, BETH	818666
XXX-XX-0011	BOSS, BERNARD PHD	818669
XXX-XX-0061	CALCULUS, CHRIS	818677
XXX-XX-0064	DESK, DANIEL	818679
XXX-XX-0010	EASEL, EMMA	818668
XXX-XX-0002	GEBRA, AL	818658
XXX-XX-0060	GEOGRAPHY, GEOFF	818675

- 5) Click the arrows at the bottom of the records window, or enter specific page numbers, to view the found records.



XXX-XX-0002	GEBRA, AL	818658
XXX-XX-0060	GEOGRAPHY, GEOFF	818675
XXX-XX-0013	GOODE, IMA	818671
XXX-XX-0014	HISTORY, HANK	818672

Page 1 of 2 Rows: 1 - 10 of 20

Viewing Employment Information

Employee work history (only with your employer) displays on the *Employment* tab. To view this history:

- 1) Search for and select an employee record as described in the previous sections and click the *Employment* tab. The *Employment* window opens. The employee's employment information, events, and Rate/R+ plan information display.

Note You can click **New Search** to search for an employee from the *Employment* window.

MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: BIOLOGY, BETH (New Search) SSN: XXX-XX-XXXX

Employment Information

Controls

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="checkbox"/>	09/01/2003	//	9005	GOTHAM PUBLIC SCHOOLS	Teacher	26	LS	<input checked="" type="checkbox"/>	Pending Enrollment

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="checkbox"/>	09/01/2003	09/15/2003	01/04/2010	Contributing	100	0
<input checked="" type="checkbox"/>	01/05/2010	01/17/2010	05/14/2010	LOA-Non-Contributing <=1 Yr	0	0
<input checked="" type="checkbox"/>	05/15/2010	05/23/2010	//	Contributing	80	0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Note You may not change any information in the Employment Information or Rate/R+ sections (blue arrows), as they are view-only. However, you may add, update, and delete data in the Events section (red arrow).

Understanding employee work history events

Work history events are used to help track career changes that may alter your employee's retirement credit and status. Work History Events can be added prospectively or retroactively as needed. Events also help MyTRS track district registration and contribution receipt dates for each employee. For example, a member might go from contributing to an unpaid leave of absence and then back to contributing.

To record a change in your employee's status, add a work history event into your employee's event history. Each work history event has six important components, as described below.

Note Employers can make changes to the last two events in effect for employees to make corrections. However, once a termination event is added to an employee, you will have to contact your MTRS Employer Services Unit to have the termination removed. **You can still correct the dates for the termination event if needed.** See [Correct a Termination Event](#) for more details.

Note If your employee is returning to service after being terminated, you **must** register this employee for his/her new employment period.

The screenshot shows a table titled "Events" with columns: Active, Event Start Date, Effective Pay Date, Event Stop Date, Event, FTE %, and WC %. There are three rows of data:

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="checkbox"/>	09/01/2003	09/15/2003	01/04/2010	Contributing	100	0
<input type="checkbox"/>	01/05/2010	01/17/2010	05/14/2010	LOA-Non-Contributing <=1 Yr	0	0
<input type="checkbox"/>	05/15/2010	05/23/2010	/ /	Contributing	80	0

- **Event Start Date** - This is the first date that the event is effective. The event start date for a contributing event might be, for example, the first day of school or the employee's first day returning from a leave of absence. The event start date for a termination event would be the first date the employee is **not working**. An employee terminating at the end of a school year might have a termination event start date of July 1st, even if the member is paid through August.

Note All retirees must be terminated in MyTRS before they can be retired or allowed to take a refund.

- **Eff(ective) Pay Date** - MyTRS events have been designed to store event start and stop dates separate from the the pay date that MyTRS should expect the new pay status to take effect. The effective pay date allows MyTRS to conform to almost any pay situation while tracking employee payments. For instance, a member who terminates on July 1st may have a termination start date of July 1st but a pay effective date in September, because the employee is paid through the summer.

Note The effective pay date for non-pay events should be the first pay date on which the MTRS should **not** expect a deduction. Effective pay dates do not have to be an actual pay date as long as they occur between the pay date on which one event was in effect and the pay date on which the new event takes effect. For example: for a leave of absence event for which the pay is effective after 05/15/2011, you must enter any date from 05/16/2011 and 05/29/2011 (assuming 05/29/2011 would have been the member's next pay date).

- **Event Stop Date** - When new events are added, the previous event in effect needs to be stopped. Only one event can be in effect on any given day. Previous events must be stopped one day earlier than their successor event. For instance, the contributing event stop date for an employee terminating at the end of a school year should be listed as June 30th when the termination start date is July 1st.
-

Note The current event in effect cannot have an event stop date.

- **Event** - This is a drop-down menu with various statuses, including **contributing**, **leave of absence**, and **termination**.
- **FTE %** - The FTE % field determines what percentage of full-time the MTRS should be using to calculate expected deductions and creditable service for pay events such as **contributing** or **Military Leave of Absence - partially paid**. The FTE % for non-pay statuses should be zero.
- **WC %** - This field is only needed for workers' compensation-related events and should have the percentage of full-time a member is being paid (non-workers' compensation benefits) while on workers' compensation.

Setting an employee to a non-pay/deduction status

The following instructions will guide you through adding the following Non-pay / deduction events:

- LOA-Non-Contributing<=1 Yr
- LOA-Medical-Non-Contributing
- LOA-Non-Contributing>1Yr
- WC-Full Incapacity&Non-Contributing
- WC-Part Incapacity&Non-Contributing
- Military LOA
- Termination-Job Elimination
- Termination-Involuntary
- Termination-Voluntary
- Ineligible

- 1) Navigate to the *View/Update Member Information* window.
- 2) Search for an employee.
- 3) Click the *Employment* tab. The member employment information, events, and Rate/R+ plan information displays.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: GEBRA, AL (New Search) SSN: XXX-XX-0002

Employment Information

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="checkbox"/>	09/01/1974	/ /	9005	GOTHAM PUBLIC SCHOOLS	Teacher	26	LS		Pending Enrollment

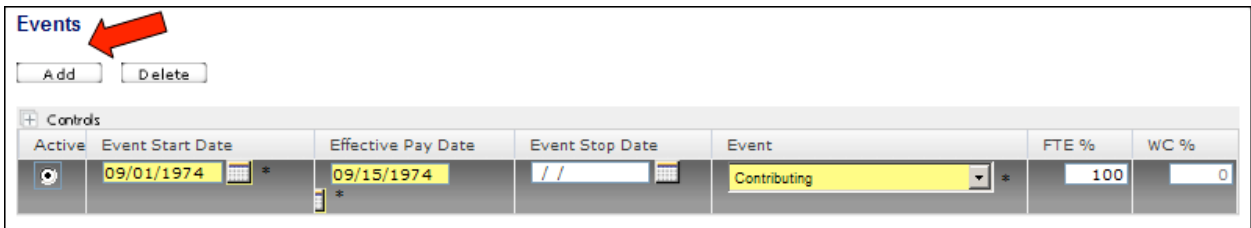
Events

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="checkbox"/>	09/01/1974	09/15/1974	/ /	Contributing	100	0

Rate/R+

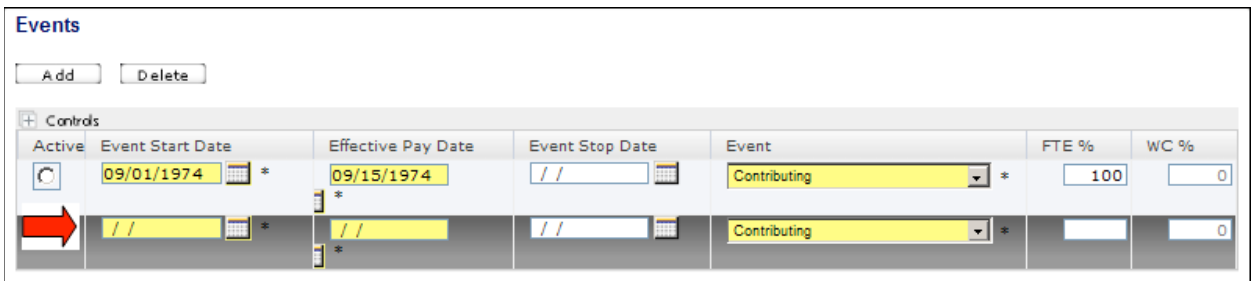
Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

- 4) Click **Add** in the Events section.



The screenshot shows the 'Events' section with 'Add' and 'Delete' buttons. Below them is a 'Controls' section with a table. The table has columns: Active, Event Start Date, Effective Pay Date, Event Stop Date, Event, FTE %, and WC %. The first row shows an active event starting on 09/01/1974, with an effective pay date of 09/15/1974, and an event type of 'Contributing' with 100% FTE and 0% WC. A red arrow points to the 'Add' button.

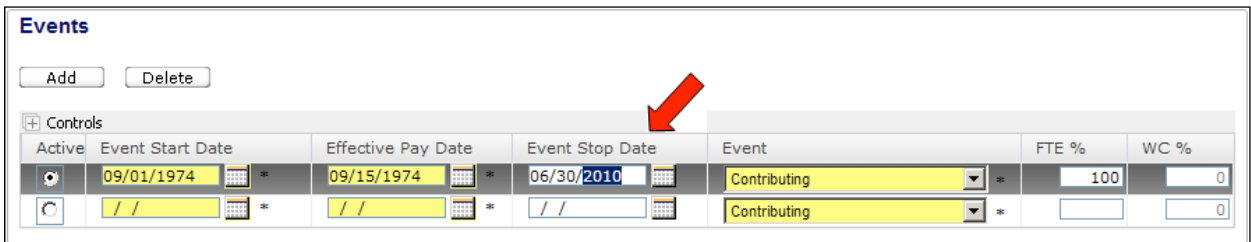
A new line with blank date fields appears.



The screenshot shows the 'Events' section with the same table as before. A new line has been added below the first row, with blank date fields for Event Start Date, Effective Pay Date, and Event Stop Date. A red arrow points to the new line.

Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.

- 5) Enter an **Event Stop Date** for the existing event.



The screenshot shows the 'Events' section with the same table. The 'Event Stop Date' field for the first row is now populated with '06/30/2010'. A red arrow points to this field.

Note A member can have only one open event at a time, so the existing event must be closed by adding a stop date before another event can be added and saved. The event stop date must be one day before the new event start date.

Note In most cases, the **Event Stop Date** should be the only field in the existing event that needs to be entered. This might not be true if the existing event needs a correction.


- 6) Enter the **Start Date** for the new non/pay/deduction event.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010 *	Contributing	100	0
<input checked="" type="radio"/>	07/01/2010 *	/ / *	/ / *	Contributing		0

Rate/R+ 

Note The new event start date must be one day after the previous event's stop date.


- 7) Enter the **Effective Pay Date** for the new non-pay/deduction event.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010 *	Contributing	100	0
<input checked="" type="radio"/>	07/01/2010 *	08/27/2010 *	/ / *	Contributing		0

Rate/R+ 

Note The **Effective Pay Date** for non-pay/deduction events can be any date between the member's last contributing pay date and the subsequent expected pay date based on his/her pay schedule.

Note Setting this date to your employee's last pay date will cause MyTRS to flag the employee's record when his/her last pay date is reported.

Note The event stop date for the non-pay/deduction event in effect must remain blank so the system knows that this event is currently in effect.

- 8) Select your non-pay / deduction Event from the pull-down field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010 *	Contributing	100	0
<input checked="" type="radio"/>	07/01/2010 *	08/27/2010 *	/ /	Contributing		0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

Contributing
LOA-Fully Contributing
LOA-Partially Contributing
LOA-Non-Contributing <= 1 Yr
LOA-Medical-Non-Contributing
WC-Full Incapacity&Contrib
WC-Full Incapacity&Non-Contrib
WC-Part Incapacity&Contrib
WC-Part Incapacity&Non-Contrib
Military LOA-Contributing
Military LOA
Termination-Job Elimination
Termination-Involuntary
Termination-Voluntary
LOA-Non-Contributing > 1 Yr
Ineligible

- 9) The full-time percentage for non-pay / deduction events is always zero.


Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010 *	Contributing	100	0
<input checked="" type="radio"/>	07/01/2010 *	08/27/2010 *	/ /	Termination-Voluntary	0	0

Rate/R+



- 10) If your non-pay / deduction event is for worker's compensation, enter the percentage of workers' compensation paid to the member in the **WC %** field. If you are not entering a workers' compensation event, enter a zero.


Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010 *	Contributing	100	0
<input checked="" type="radio"/>	07/01/2010 *	08/27/2010 *	/ /	Termination-Voluntary	0	0

Rate/R+



Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.


- 11) Click **Save**. A message at the top of the screen will confirm that the employment information has been saved. The event is saved and the record is updated.

MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: GEBRA, AL (New Search) SSN: XXX-XX-0002

Messages(1)
Employment information has been saved. 

Employment Information

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="checkbox"/>	09/01/1974	06/30/2010	9005	GOTHAM PUBLIC SCHOOLS	Teacher	26	LS		Pending Enrollment


Events

Add Delete

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="checkbox"/>	09/01/1974 *	09/15/1974 *	06/30/2010	Contributing	100	0
<input checked="" type="checkbox"/>	07/01/2010 *	08/27/2010 *	/ /	Termination-Voluntary	0	0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save 

Correct a termination event

MyTRS has been designed to prevent employers from being able to switch an employee from a terminated status to another status. (MyTRS does, however, allow an employer to delete and replace a termination event for the purpose of correcting the termination type or dates.) The following instructions are to guide you through correcting a termination event.

Note Employers cannot restore terminated employees to a non-termination status. If this is needed, please contact your Employer Services Representative.

- 1) Navigate to the *View/Update Member Information* window.
- 2) Search for an employee.
- 3) Click the *Employment* tab. The member employment information, events, and Rate/R+ plan information displays.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: RULER, RANDY (New Search) SSN: XXX-XX-0015

Employment Information

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="checkbox"/>	09/01/1993	06/30/2000	9005	GOTHAM PUBLIC SCHOOLS	Teacher	26	LS	<input type="checkbox"/>	Pending Enrollment

Events

Add Delete

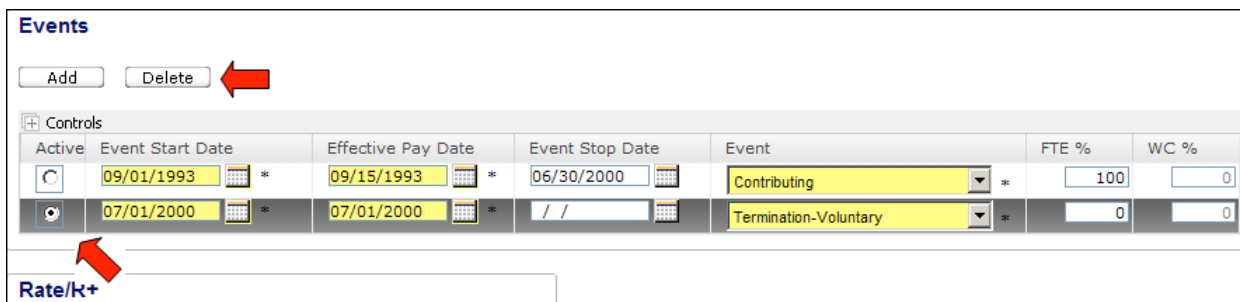
Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="checkbox"/>	09/01/1993	09/15/1993	06/30/2000	Contributing	100	0
<input checked="" type="checkbox"/>	07/01/2000	07/01/2000	/ /	Termination-Voluntary	0	0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

- 4) Highlight your employee's termination event in the Events section. Click **Delete**.



Events

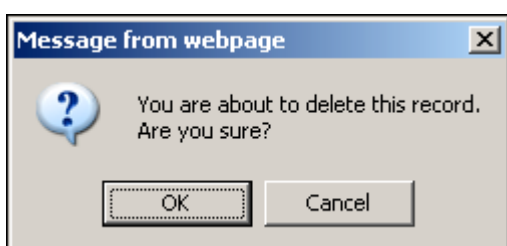
Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1993	09/15/1993	06/30/2000	Contributing	100	0
<input checked="" type="radio"/>	07/01/2000	07/01/2000	/ /	Termination-Voluntary	0	0

Rate/k+

- 5) Click **OK** to confirm that you would like to delete the record.

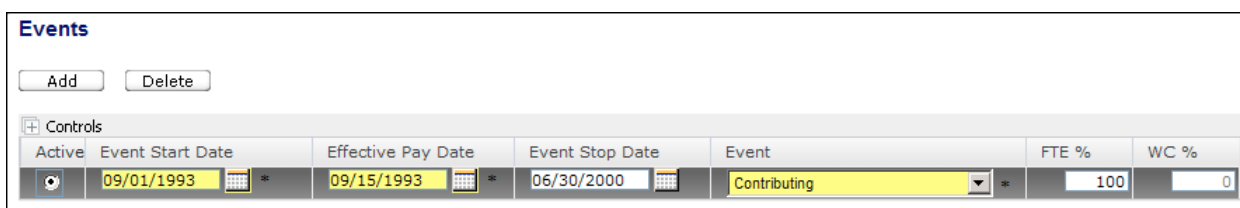


Message from webpage

? You are about to delete this record.
Are you sure?

OK Cancel

Your employee's termination event will disappear.



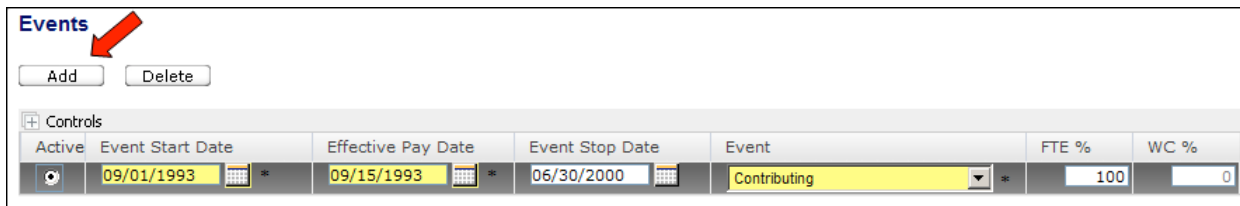
Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/1993	09/15/1993	06/30/2000	Contributing	100	0

- 6) Click **Add** to enter your replacement termination event.



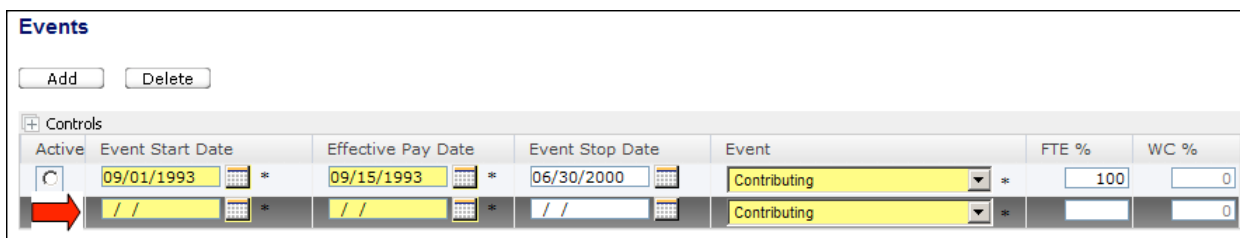
Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/1993	09/15/1993	06/30/2000	Contributing	100	0

A new line with blank date fields appears.



Events

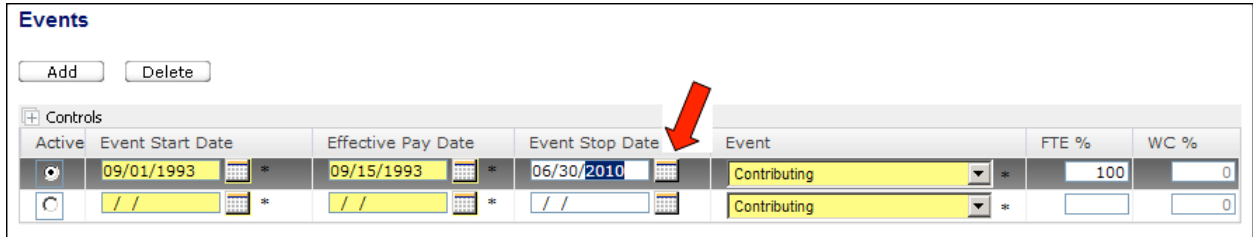
Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1993	09/15/1993	06/30/2000	Contributing	100	0
<input checked="" type="radio"/>	/ /	/ /	/ /	Contributing		0

Note Employers cannot restore terminated employees to a non-termination status. If this is needed, please contact your Employer Services Representative.

7) Correct the **Event Stop Date** of the existing event (if needed).



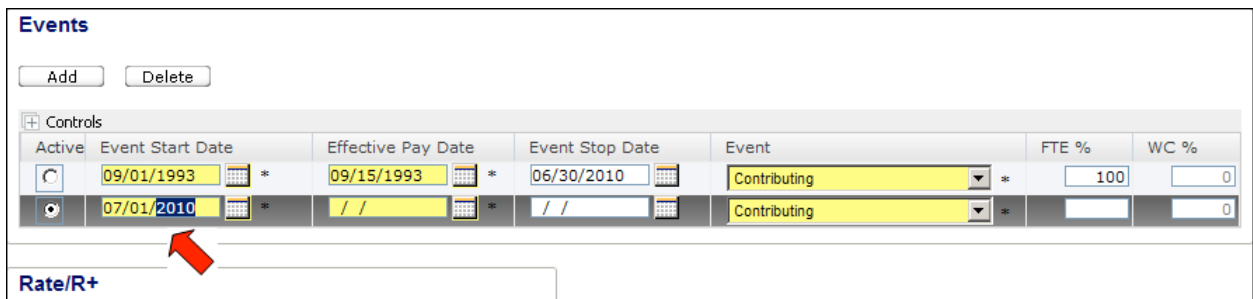
The screenshot shows the 'Events' form with a table of events. A red arrow points to the 'Event Stop Date' field of the first event, which is currently '06/30/2010'.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0
<input type="radio"/>	/ /	/ /	/ /	Contributing		0

Note A member can have only one open event at a time, so the existing event must be closed by adding a stop date before another event can be added and saved. The event stop date must be one day before the new event start date.

Note In most cases, the **Event Stop Date** should be the only field in the existing event that needs to be entered. This might not be true if the existing event needs a correction.

8) Enter the **Start Date** for the new termination event.



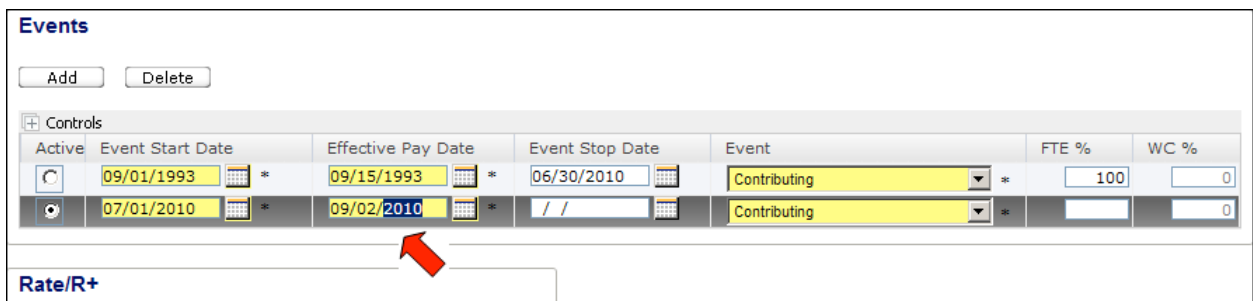
The screenshot shows the 'Events' form with a table of events. A red arrow points to the 'Event Start Date' field of the second event, which is currently '/ /'.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0
<input type="radio"/>	07/01/2010	/ /	/ /	Contributing		0

Rate/R+

Note The new event start date must be one day after the previous event's stop date.

9) Enter the **Effective Pay Date** for the new termination event.



The screenshot shows the 'Events' form with a table of events. A red arrow points to the 'Effective Pay Date' field of the second event, which is currently '09/02/2010'.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0
<input type="radio"/>	07/01/2010	09/02/2010	/ /	Contributing		0

Rate/R+

Note The **Effective Pay Date** for non-pay/deduction events can be any date between the member's last contributing pay date and the subsequent expected pay date based on his/her pay schedule.

Note Setting this date to your employee's last pay date will cause MyTRS to flag the employee's record when his/her last pay date is reported.

Note The event stop date for the non-pay/deduction event in effect must remain blank so the system knows that this event is currently in effect.

10) Select your termination event from the pull-down field.

The screenshot shows the 'Events' form with the 'Event' dropdown menu open. The menu lists various event types, and 'Termination-Voluntary' is highlighted. The form includes fields for 'Active', 'Event Start Date', 'Effective Pay Date', 'Event Stop Date', 'Event', 'FTE %', and 'WC %'. The 'Rate/R+' section is also visible, showing 'Regular Rate' as 0.11 and '2% Rate' as 0.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0
<input type="radio"/>	07/01/2010	09/02/2010	/ /	Contributing		0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

11) The full-time percentage for termination events is always zero. Enter a zero in the **FTE %** field.

The screenshot shows the 'Events' form with the 'Event' dropdown menu open. The menu lists various event types, and 'Termination-Voluntary' is highlighted. The form includes fields for 'Active', 'Event Start Date', 'Effective Pay Date', 'Event Stop Date', 'Event', 'FTE %', and 'WC %'. The 'Rate/R+' section is also visible, showing 'Regular Rate' as 0.11 and '2% Rate' as 0. A red arrow points to the 'FTE %' field for the 'Termination-Voluntary' event, which is set to 0.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974	09/15/1974	06/30/2010	Contributing	100	0
<input type="radio"/>	07/01/2010	08/27/2010	/ /	Termination-Voluntary	0	0


Rate/R+

12) The WC % is always zero for a termination event. Enter a zero in the WC % field.

Events

Controls							
Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %	
<input type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0	
<input checked="" type="radio"/>	07/01/2010	09/02/2010	/ /	Termination-Voluntary	0	0	

Rate/R+



Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.


13) Click **Save**. A message at the top of the screen will confirm that the employment information has been saved. The event is saved and the record is updated.

MyTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: RULER, RANDY (New Search) SSN: XXX-XX-0015

Messages(1)
Employment information has been saved. 

Employment Information


Controls									
Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="radio"/>	09/01/1993	06/30/2010	9005	GOTHAM PUBLIC SCHOOLS	Teacher	26	LS		Pending Enrollment

Events

Controls							
Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %	
<input type="radio"/>	09/01/1993	09/15/1993	06/30/2010	Contributing	100	0	
<input checked="" type="radio"/>	07/01/2010	09/02/2010	/ /	Termination-Voluntary	0	0	

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0



Setting an employee to a partially paid leave status

The following instructions are to guide you through adding the following partially paid events:

- LOA-Partially Contributing
- WC-Full Incapacity&Contributing
- WC-Part Incapacity&Contributing
- Military LOA-Contributing

- 1) Navigate to the *View/Update Member Information* window.
- 2) Search for an employee.
- 3) Click the *Employment* tab. The member employment information, events, and Rate/R+ plan information displays.

Home » Your Members » View/Update Member Information


Demographics Employment

Employee/Member: SCIENCE, SARAH (New Search) SSN: XXX-XX-0004

Employment Information

Controls									
Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="radio"/>	09/01/2003	/ /	9005	GOTHAM PUBLIC SCHOOLS	Kindergarten	26	LS	<input type="checkbox"/>	Pending Enrollment

Events

 Add Delete

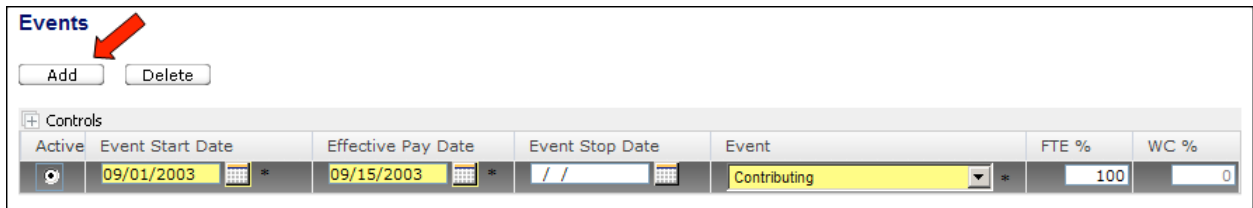
Controls						
Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	/ /	Contributing	100	0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

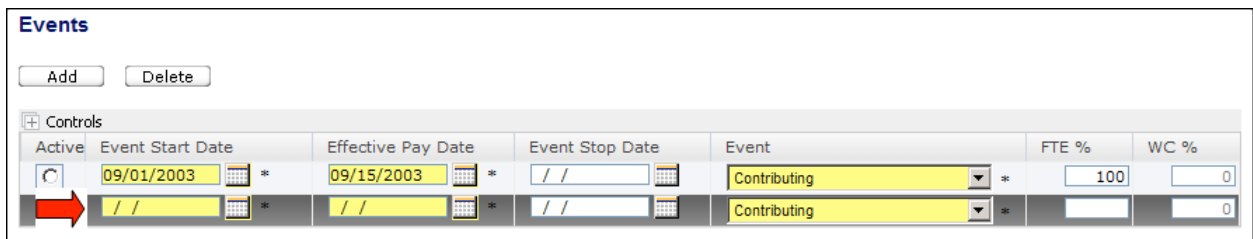
- 4) Click **Add** in the Events section.



The screenshot shows the 'Events' section with a red arrow pointing to the 'Add' button. Below the buttons is a 'Controls' section with a table of event data.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	//	Contributing	100	0

A new line with blank date fields appears.

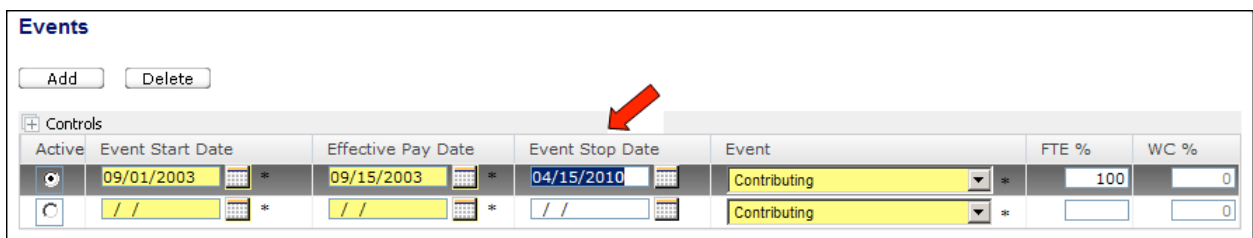


The screenshot shows the 'Events' section with a red arrow pointing to the 'Add' button. Below the buttons is a 'Controls' section with a table of event data.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	//	Contributing	100	0
<input type="radio"/>	//	//	//	Contributing		0

Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.

- 5) Enter an **Event Stop Date** for the existing event.



The screenshot shows the 'Events' section with a red arrow pointing to the 'Event Stop Date' field of the existing event. Below the buttons is a 'Controls' section with a table of event data.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	//	//	//	Contributing		0

Note A member can have only one open event at a time, so the existing event must be closed by adding a stop date before another event can be added and saved. The event stop date must be one day before the new event start date.

Note In most cases, the **Event Stop Date** should be the only field in the existing event that needs to be entered. This might not be true if the existing event needs a correction.

- 6) Enter the **Start Date** for the new partially paid event.

The screenshot shows the 'Events' form with a table of event records. The first record has an Event Start Date of 09/01/2003, an Effective Pay Date of 09/15/2003, and an Event Stop Date of 04/15/2010. The second record has an Event Start Date of 04/16/2010, an Effective Pay Date of //, and an Event Stop Date of //. A red arrow points to the 'Event Start Date' field of the second record.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input checked="" type="radio"/>	04/16/2010	//	//	Contributing		0

Note The event Start Date must be one day after the previous event's stop date.

- 7) Enter the **Effective Pay Date** for the new partially paid event.

The screenshot shows the 'Events' form with the same table as before. The 'Effective Pay Date' field of the second record is now 05/13/2010, highlighted with a red arrow.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input checked="" type="radio"/>	04/16/2010	05/13/2010	//	Contributing		0

Note The **Effective Pay Date** for partially paid events should be the first pay date on which a partial payment is expected. This can be any pay date between the new partial pay date and the previous event's last pay date based on the employee's pay schedule.

Note Setting this date incorrectly will cause MyTRS to flag the employee's record when his/her deductions are reported to the MTRS.

Note The event stop date for the partially paid event in effect must remain blank so the system knows that this event is currently in effect.

- 8) Select the Event from the pull-down field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010	Contributing	100	0
<input checked="" type="radio"/>	04/16/2010 *	05/13/2010 *	/ /	Contributing		0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

Event dropdown menu options:

- Contributing
- LOA-Fully Contributing
- LOA-Partially Contributing
- LOA-Non-Contributing <=1 Yr
- LOA-Medical-Non-Contributing
- WC-Full Incapacity&Contrib
- WC-Full Incapacity&Non-Contrib
- WC-Part Incapacity&Contrib
- WC-Part Incapacity&Non-Contrib
- Military LOA-Contributing
- Military LOA
- Termination-Job Elimination
- Termination-Involuntary
- Termination-Voluntary
- LOA-Non-Contributing > 1 Yr
- Ineligible

- 9) Enter the proper percentage of full-time employment for the event in the **FTE %** field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010	Contributing	100	0
<input checked="" type="radio"/>	04/16/2010 *	05/13/2010 *	/ /	LOA-Partially Contributing	63	0

Rate/R+

Note If your employee is being paid on a pro-rated basis (for example, an employee on maternity leave having her pay stretched out over the rest of a school year), the FTE percentage should be set to reflect the percentage of earnings paid in relation to what that employee would earn on a full-time basis.

- 10) If your partially paid event is for worker's compensation, enter the percentage of workers' compensation paid to the member in the **WC %** field. If you are not entering a worker's compensation event, enter a zero.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/1974 *	09/15/1974 *	06/30/2010	Contributing *	100	0
<input type="radio"/>	07/01/2010 *	08/27/2010 *	/ /	Termination-Voluntary *	0	0

Rate/R+

Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.

- 11) Click **Save**. A message at the top of the screen will confirm that the employment information has been saved. The event is saved and the record is updated.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: SCIENCE, SARAH (New Search) SSN: XXX-XX-0004

Messages(1)
Employment information has been saved.

Employment Information

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input type="radio"/>	09/01/2003	/ /	9005	GOTHAM PUBLIC SCHOOLS	Kindergarten	26	LS	<input type="checkbox"/>	Pending Enrollment

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010	Contributing *	100	0
<input type="radio"/>	04/16/2010 *	05/13/2010 *	/ /	LOA-Partially Contributing *	63	0

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

Restoring a member to a fully paid status

The following instructions are to guide you through adding the following fully paid events:

- Contributing
- LOA-Fully Contributing

- 1) Navigate to the View/Update Member Information window.
- 2) Search for an employee.
- 3) Click the *Employment* tab. The member employment information, events, and Rate/R+ plan information displays.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: SCIENCE, SARAH (New Search) SSN: XXX-XX-0004

Employment Information

Controls

Active	Start Date	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="radio"/>	09/01/2003	//	9005	GOTHAM PUBLIC SCHOOLS	Kindergarten	26	LS		Pending Enrollment

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010 *	Contributing	100	0
<input type="radio"/>	04/16/2010 *	05/13/2010 *	//	LOA-Partially Contributing	63	0

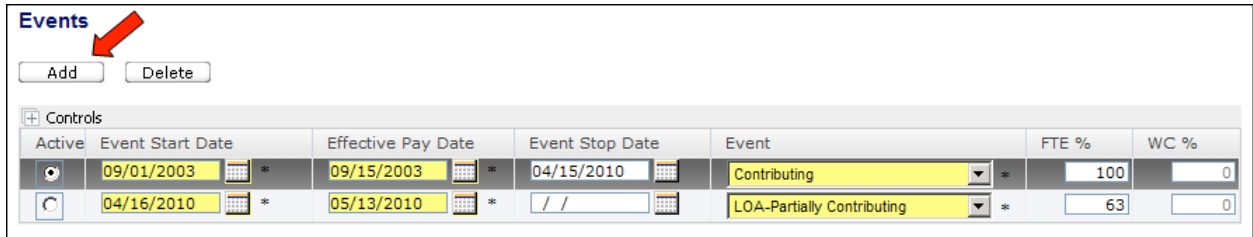
Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

* Denotes Required Field

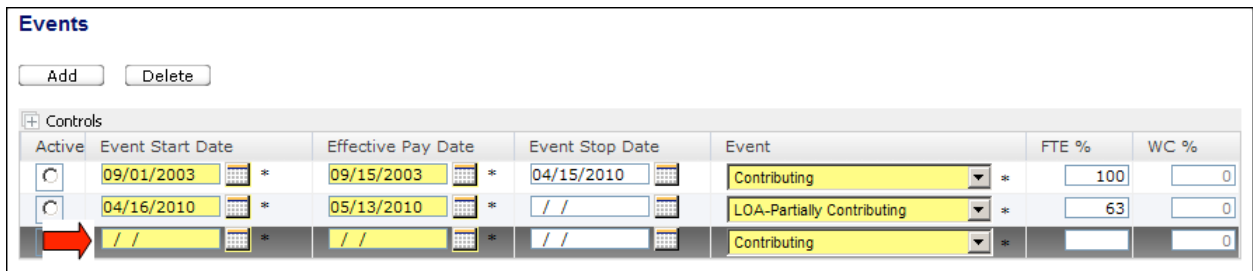
- 4) Click **Add** in the Events section.



The screenshot shows the 'Events' section with a table of employee events. A red arrow points to the 'Add' button. The table has columns for Active, Event Start Date, Effective Pay Date, Event Stop Date, Event, FTE %, and WC %.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	/ /	LOA-Partially Contributing	63	0

A new line with blank date fields appears.

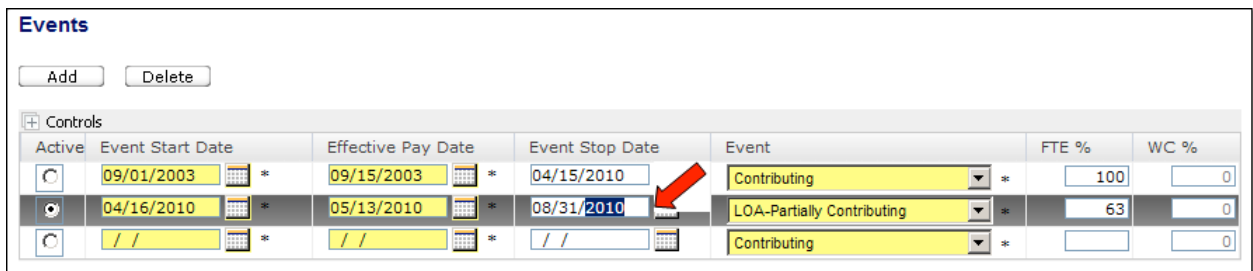


The screenshot shows the 'Events' section with a table of employee events. A red arrow points to a new line with blank date fields. The table has columns for Active, Event Start Date, Effective Pay Date, Event Stop Date, Event, FTE %, and WC %.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	/ /	LOA-Partially Contributing	63	0
<input type="radio"/>	/ /	/ /	/ /	Contributing		0

Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.

- 5) Enter an **Event Stop Date** for the existing non-pay / deduction or partially paid event.



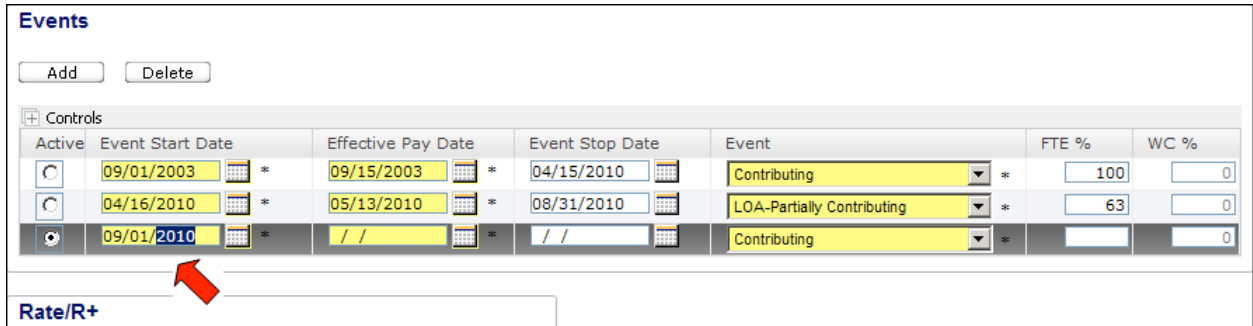
The screenshot shows the 'Events' section with a table of employee events. A red arrow points to the 'Event Stop Date' field for the second event. The table has columns for Active, Event Start Date, Effective Pay Date, Event Stop Date, Event, FTE %, and WC %.

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input checked="" type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	08/31/2010	LOA-Partially Contributing	63	0
<input type="radio"/>	/ /	/ /	/ /	Contributing		0

Note A member can have only one open event at a time, so the existing event must be closed by adding a stop date before another event can be added and saved. The event stop date must be one day before the new event start date.

Note In most cases, the **Event Stop Date** will be the only required field in the existing event. This might not be true if the existing event needs a correction.

6) Enter the **Start Date** for the new fully paid event.



Events

Add Delete

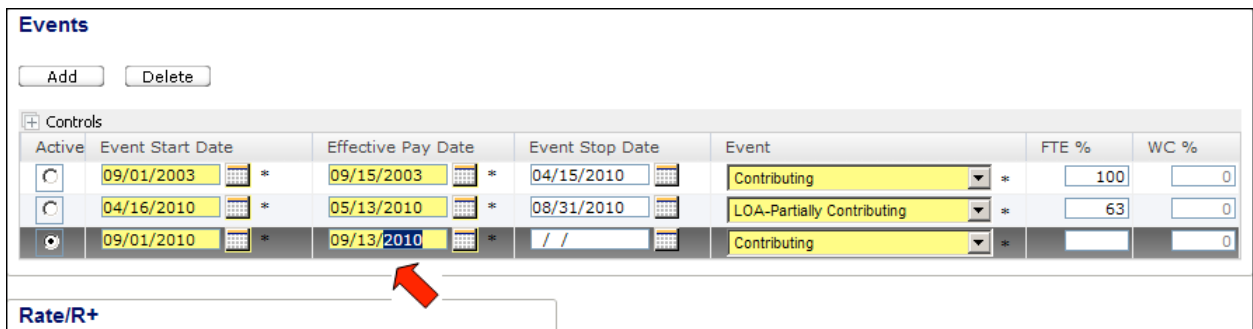
Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010 *	Contributing	100	0
<input type="radio"/>	04/16/2010 *	05/13/2010 *	08/31/2010 *	LOA-Partially Contributing	63	0
<input checked="" type="radio"/>	09/01/2010 *	/ / *	/ / *	Contributing		0

Rate/R+

Note The event **Start Date** must be one day after the previous event's stop date.

7) Enter the **Effective Pay Date** for the new fully paid event.



Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003 *	09/15/2003 *	04/15/2010 *	Contributing	100	0
<input type="radio"/>	04/16/2010 *	05/13/2010 *	08/31/2010 *	LOA-Partially Contributing	63	0
<input checked="" type="radio"/>	09/01/2010 *	09/13/2010 *	/ / *	Contributing		0

Rate/R+

Note The **Effective Pay Date** for fully paid should be the first pay date on which your employee is paid full-time. This date can be any date between your employee's first full-time pay date and the previous pay date for his/her pay schedule.

Note Setting this date incorrectly may cause MyTRS to flag your employee's record when his/her last pay date is reported.

Note The event stop date for the fully paid event in effect must remain blank so the system knows that this event is currently in effect.

- 8) Select your new fully paid **Event** from the pull-down field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	08/31/2010	LOA-Partially Contributing	63	0
<input checked="" type="radio"/>	09/01/2010	09/13/2010	/ /	Contributing		

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save

Contributing
LOA-Fully Contributing
LOA-Partially Contributing
LOA-Non-Contributing <=1 Yr
LOA-Medical-Non-Contributing
WC-Full Incapacity&Contrib
WC-Full Incapacity&Non-Contrib
WC-Part Incapacity&Contrib
WC-Part Incapacity&Non-Contrib
Military LOA-Contributing
Military LOA
Termination-Job Elimination
Termination-Involuntary
Termination-Voluntary
LOA-Non-Contributing > 1 Yr
Ineligible

- 9) Because you are entering a fully contributing event, enter 100 in the **FTE %** field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	08/31/2010	LOA-Partially Contributing	63	0
<input checked="" type="radio"/>	09/01/2010	09/13/2010	/ /	Contributing	100	0

Rate/R+

- 10) Because you are entering a fully contributing event, enter zero in the **WC %** field.

Events

Add Delete

Controls

Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0
<input type="radio"/>	04/16/2010	05/13/2010	08/31/2010	LOA-Partially Contributing	63	0
<input checked="" type="radio"/>	09/01/2010	09/13/2010	/ /	Contributing	100	0

Rate/R+


Note If you have multiple events to add for an employee, it is best to add one event and click **Save** before adding an additional event, so MyTRS can validate your data entry.

- 11) Click **Save**. A message at the top of the screen will confirm that the employment information has been saved. The event is saved and the record is updated.

Home » Your Members » View/Update Member Information

Demographics Employment

Employee/Member: SCIENCE, SARAH (New Search) SSN: XXX-XX-0004

Messages(1)
Employment information has been saved. 

Employment Information

Controls									
Active	Start Date ▼	Stop Date	Employer Code	Employer Name	Position	Pay Freq	Pay Dur	Temp/Sub	Enrollment Status
<input checked="" type="radio"/>	09/01/2003	/ /	9005	GOTHAM PUBLIC SCHOOLS	Kindergarten	26	LS		Pending Enrollment


Events

Add Delete

Controls							
Active	Event Start Date	Effective Pay Date	Event Stop Date	Event	FTE %	WC %	
<input type="radio"/>	09/01/2003	09/15/2003	04/15/2010	Contributing	100	0	
<input checked="" type="radio"/>	09/01/2010	09/13/2010	/ /	Contributing	100	0	
<input type="radio"/>	04/16/2010	05/13/2010	08/31/2010	LOA-Partially Contributing	63	0	

Rate/R+

Name	Value
Rate/R+ Pending Review:	<input type="checkbox"/>
R+:	<input checked="" type="checkbox"/>
Regular Rate:	0.11
2% Rate:	0

Save 

You have completed this guided practice.