Completing the CBA Collection Process

A Tutorial for TRS-covered Employers

TRS ILLINOIS

Why are employers asked to complete the CBA Collection Process?

- This portal has been established to help the Teachers' Retirement System (TRS) and you administer Public Act 100-0587, signed into law June 4, 2018, that may affect the amount of employer contributions you pay to TRS. Under this law, an employer's contribution to TRS may rise for a member who was granted a salary increase on or after July 1, 2018 that exceeds 3 percent over the previous year's salary – if the resulting higher salary is used to determine the member's Final Average Salary upon retirement.

- Prior to the effective date of PA 100-0587, the salary increase threshold triggering a higher employer contribution was set at 6 percent. The underlying law, which has been in place since 2005, requires employers to pay TRS a contribution equal to the actuarial value of the pension benefit created by any salary increase that exceeds the threshold.

Why are employers asked to complete the CBA Collection Process (cont'd)?

- The law setting the threshold at 3 percent contains a "grandfather" clause that applies the old 6 percent threshold on all raises after July 1, 2018 if the raise was authorized under a collective bargaining agreement (CBA) or individual employment contract that was entered into, amended or renewed prior to June 4, 2018.

- In order to determine which threshold may apply to your employees – 3 percent or 6 percent – TRS must gather information from you about all CBAs and individual employment contracts that were entered into, renewed or amended prior to June 4, 2018.

Completing the Information for PA 100-0587

- The CBA Collection Process must be completed and submitted online using the Employer Access Area of the TRS website.
- The TRS web address is https://trsil.org.
- The information should be submitted to TRS no later than **March 29, 2019**.
- For any district failing to complete the information and submit it to TRS, employer costs at retirement will be calculated at 3% beginning July 1, 2018.

Resources Available

- Before beginning the CBA Collection Process, employers are encouraged to review the resources available to assist with understanding the reporting process and requirements.
- Refer to the information available on the Employer page of our website under the CBA Collection (PA 100-0587) menu item.
  - *Employer Bulletin 19-09*
  - *Employer Bulletin 19-12*
  - FAQ document
- Call or email us.

Signing into the Employer Access Area

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Teachers' Retirement System
of the State of Illinois

MEMBER   EMPLOYER | MEMBER LOGIN | | EMPLOYER LOGIN |

- Go to the TRS home page.
- Click on Employer Login

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. 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, answer Challenge Question and enter Password.

Employer Access Menu

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
CBA Collection Process
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

- Click on the menu item labeled CBA Collection Process.
- A new window will open that directs you to an employer portal.

Employer Dashboard

- The landing page of the employer portal is your Employer Dashboard.
- Any tasks that need completed will appear in the Task List.
- Click on the Public Act 100-0587 CBA Collection Process link to begin.

CBA Collection Process

- The flow chart shows the 3 steps that need to be taken to complete the task and also indicates where you are in the process.
- Upon initial entry, click on Add Agreement or select Proceed.
- You will be taken to the Agreement List screen.

Agreement List

- You will need to add each collective bargaining agreement (CBA) and/or individual contract that was entered into, renewed or amended prior to June 4, 2018 for any members 45 or older as of July 1, 2018.
- If any employees were not covered by a CBA or contract, you will need to select No CBA/No Contract.
- Choose Add Agreement to begin adding agreements.
- Click on Proceed to Employee List after all agreements are added.

Adding Agreements

Add Agreement

Agreement Type
CBA
- CBA
- Contract
- No CBA/No Contract

Date Entered Into, Last Amended, or Renewed Prior to 06/04/2018

Agreement Expiration Date

Reason
Public Act 100-0587

Agreement File

Upload a file with the file dialog or by dragging and dropping in dashed region.
Acceptable formats are: jpg, png, or pdf.

Choose File

CANCEL   ADD

- For each CBA and/or contract, you will be required to enter the following information:
  - Agreement Name
  - Date entered into, last amended, or renewed prior to June 4 2018
  - Agreement expiration date
- For No CBA/No Contract, no additional information is required on this screen.
- You are required to upload a copy of the collective bargaining agreement for each CBA created.
- No files are required to be uploaded for the agreement types of Contract or No CBA/No Contract.
- Click Add after creating each agreement type.

Assigning Employees to Agreements

- The Employee List is prepopulated with all full and part-time contractual teachers age 45 and older as of July 1, 2018 that were included on your 2017-18 Annual Report.
- You will need to assign each employee in the list to the specific CBA(s) or contract(s) you entered on the Agreement List.
- For any employee not covered by a CBA or contract, select the No CBA/No Contract option.
- Employees can be sorted by each column header.
- Employees can be assigned in a group by selecting the box to the right of Actions.
- To edit by individual, click on the edit icon (✏) to the left of the employee's name.

Adding and Deleting Employees from the Employee List

- To add any employees not included in the list, click on the Add Employee button under Employee List.
- To delete any employees no longer employed with the district, click on the delete icon (🗑) to the left of the employee's name.

Submitting to TRS

Employee List

Actions			First Name ▲▼	Last Name ▲	SSN ▲▼	DOB ▲▼	Agreement Name ▲▼	Date Entered Into, Last... ▲▼	Agreement Expiration Date ▲▼	Employment Policies ▲▼
✏ 🗑	☐		John	Adams	357-45-9872	05/07/1973	Teachers' Contract	07/01/2015	06/30/2020	

Search...

+🧑 ASSIGN EMPLOYEES   +🧑 ADD EMPLOYEE

Proceed to Summary →

- Once you have assigned all employees to an agreement, click on Proceed to Summary.

Add Agreement ———— Assign Employees ———— Review & Submit

Review and Submit Agreements

I agree that all information submitted online to TRS is based on official records and is true to the best of my knowledge. By submitting, I certify that this information is correct. I am aware that pursuant to the Illinois Pension Code, 40 ILCS 5/1-135, any person who knowingly makes any false statement or falsifies or permits to be falsified any record in an attempt to defraud the Teachers' Retirement System is guilty of a Class 3 felony. Please be advised that if the TRS Board has a reasonable suspicion that a false record has been filed with the System, it is required to report the matter to the appropriate state's attorney for investigation.

Once you click submit, the Agreement and Employee Lists will be submitted to TRS. After the information has been submitted to TRS you will be able to view the Agreement and Employee Lists but you will not be able to make any changes. If changes are required, email the TRS Employer Services Department at Employers@trsil.org.

← Return To Agreement List

SUBMIT

- Read the terms then click on Submit to send the information to TRS.

Signing Out
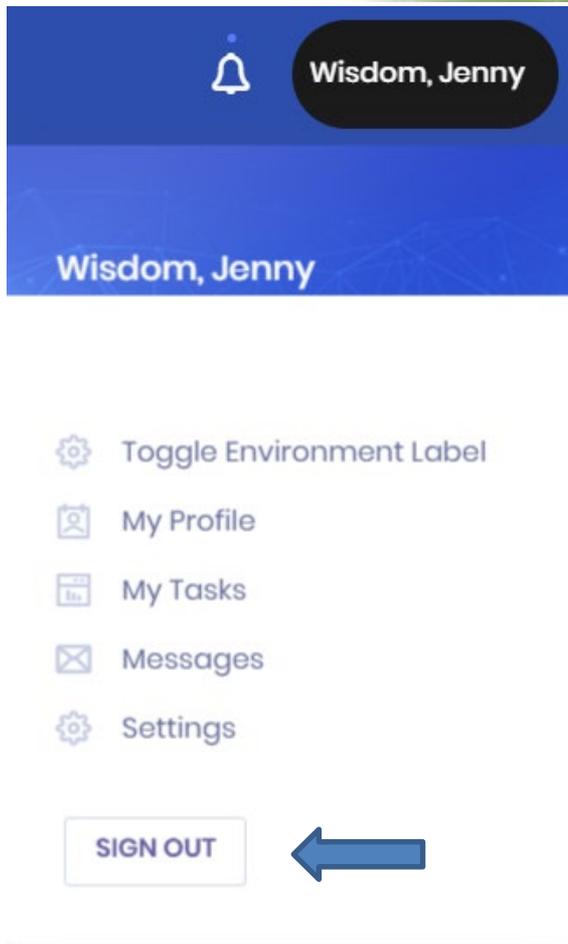
- Once your agreement is submitted, click on your name in the top right corner and select Sign Out.