

TMRS & Cities – Staying in Tune

TMRS City Portal Training

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Training Objectives



- Portal Overview
- Portal Access
- Registering Administrator and Users
- Terms of Service and Confidentiality
- Sneak Peek – Using the Portal

What Is the City Portal?

Online TMRS access for cities



- Access TMRS data for your city
- Access TMRS data for your city's employees
- Perform web-based administrative functions pertaining to TMRS

What can I Do on the Portal?

- Make member inquiries
 - Account balances
 - Refund status
 - Payroll information
- Generate retirement estimates



- Run city reports
 - Vesting
 - Retirement eligibility
- Submit payroll file

Who has Access to the Portal?

- City Portal Administrators
- City Portal Users



- Both must be contributing TMRS members
- Both must be authorized TMRS contacts for your city

City Portal Administrator

Serves as TMRS' "master" City Portal User

- Controls local access to the Portal
 - Assigns and removes users
 - Assigns roles
 - Trains users
- Monitors Portal activity within the city

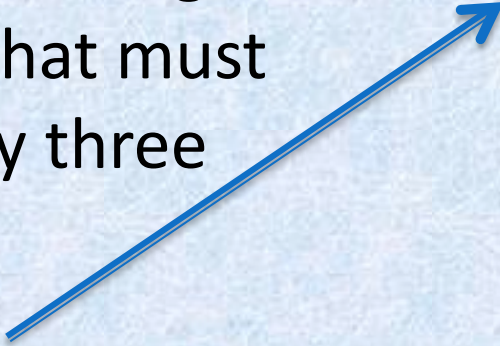


Registering the Portal Administrator



- One Administrator per city
 - Must be assigned by TMRS' Correspondent or City Manager
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- Correspondent and Administrator may be the same person
 - Must sign and agree to the terms in the TMRS City Portal Use Agreement

City Portal Use Agreement

- The City Portal Use Agreement is a legal document that must be signed by three parties:
 - The city
 - The Administrator
 - TMRS
 - The city section must be signed by someone with the legal authority to sign documents on behalf of the city
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City Portal Use Agreement

Administrator must agree to:

- Attend training
- Assume responsibility for Users within the city



- Adhere to strict confidentiality standards
- Use the Portal exclusively for official city business

Confidentiality Standards

- Information identifiable with specific individuals provided via the Portal is confidential
- Wrongful disclosure of confidential information is prohibited by Section 855.115 of the TMRS Act and Section 552.101 of the Public Information Act
- Public Information Act makes wrongful disclosure a misdemeanor and official misconduct
- Requests for TMRS information (open records requests, media requests, requests by individuals other than the member, retiree, spouse, or others as provided by 855.115(a)(1)) must be submitted and addressed to TMRS

Assigning Portal Users

- City employees who administer TMRS benefits may be granted access to the Portal by the Portal Administrator



- Portal Administrator is responsible for:
 - Granting access to the Portal
 - Assigning user roles
 - Conducting training
 - Managing user activity

Do Users Sign the City Portal Use Agreement?

- No – Only the administrator is required to sign the City Portal Use Agreement
- To qualify as authorized Users and gain access to the Portal, Users must agree to TMRS terms and conditions by signing a User's Acknowledgement
 - User's Acknowledgement provided as an attachment to the Agreement
 - Administrator ensures Users sign the acknowledgement
 - City should maintain copies of the signed agreement and the acknowledgement(s)
- Users will also acknowledge their agreement to the terms and conditions upon initiating their login to the Portal
- Users must uphold the same confidentiality standards as the Administrator

Registration Process

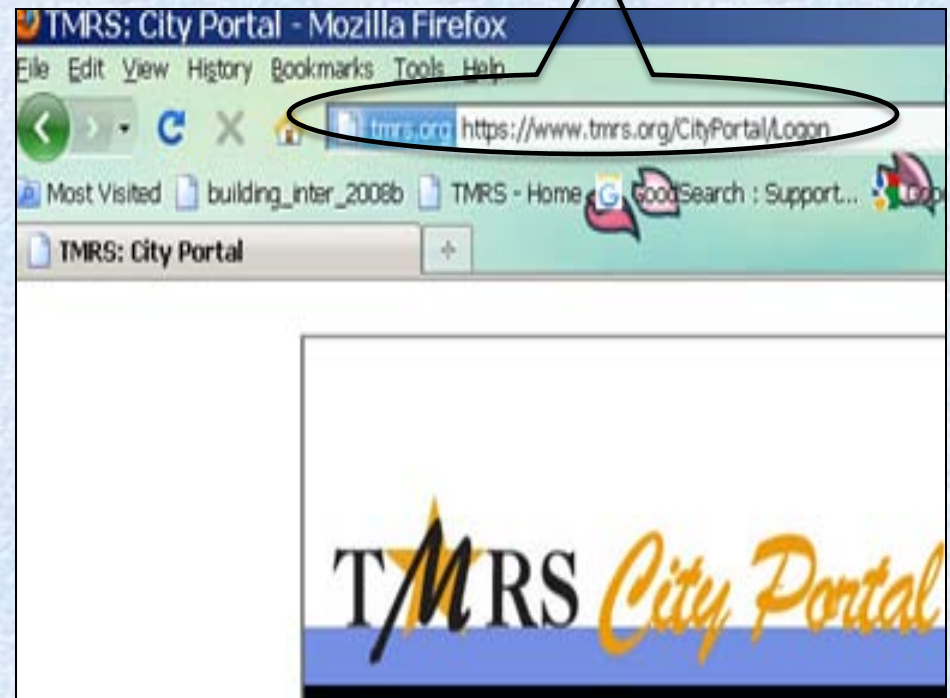
- Registration is initiated with the signed City Portal Use Agreement (see attachment)
 - Upon receipt of the signed agreement, TMRS will e-mail a link to the Administrator to identify themselves and create a user name and password
 - After creating the user name and password, the Administrator will automatically be directed to the Portal's "log on" page
 - Users will receive the same link when the Administrator grants them access

City Portal Website

- Users should immediately add the Portal website to their “favorites” if using Internet Explorer or “bookmark” it if using Firefox
- URL is case-sensitive

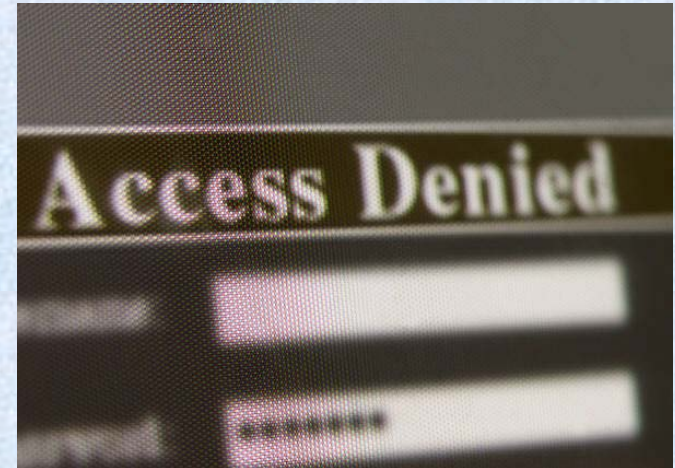
- TMRS City Portal URL address:

<https://www.tmr.org/CityPortal/Logon>



User Names and Passwords

- Passwords must:
 - Be 8-20 characters long
 - Contain uppercase and lowercase letters, and
 - Contain numbers
- Forgotten user names and passwords can be recovered through e-mail
- TMRS will never e-mail you asking for your city portal username and password



Keeping Portal Access Current

Access to the Portal must remain current

- Administrators/Users must be contributing members
 - Contact TMRS immediately if employment is terminated
 - Administrators should revoke User access if User's employment is terminated or User changes job responsibilities
- Administrators should log in at least once every 30 days, or access to the portal will be suspended

Portal Demonstration



- Enjoy the Portal Demo
- Handouts will serve as training notes and screen snapshots

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QUESTIONS?