



TESRS ONLINE TRAINING MANUAL

Table of Contents

Contents

Getting Started.....	2
How-To: New Entry.....	3
How-To: Terminate a Member	5
How-To: Membership Reconciliation Report	8
How- To: Search for Members	12
Basic Search	12
Advanced Search.....	13
How-To: Annual Reports.....	14
Add New Contacts.....	15
Add Local Board Terms and Statutory Title	19
How to Review and Complete the Annual Report.....	22

Getting Started

In order to gain access to the TESRS Online System (TOL), a local board must have a meeting and designate two Authorized Users: a primary and secondary user. The local board must also sign off on an accompanying security overview, which they will return to the Executive Director. After this is complete, the Authorized Users will have access to TOL and utilize this Training Manual to assist them in using the online database.

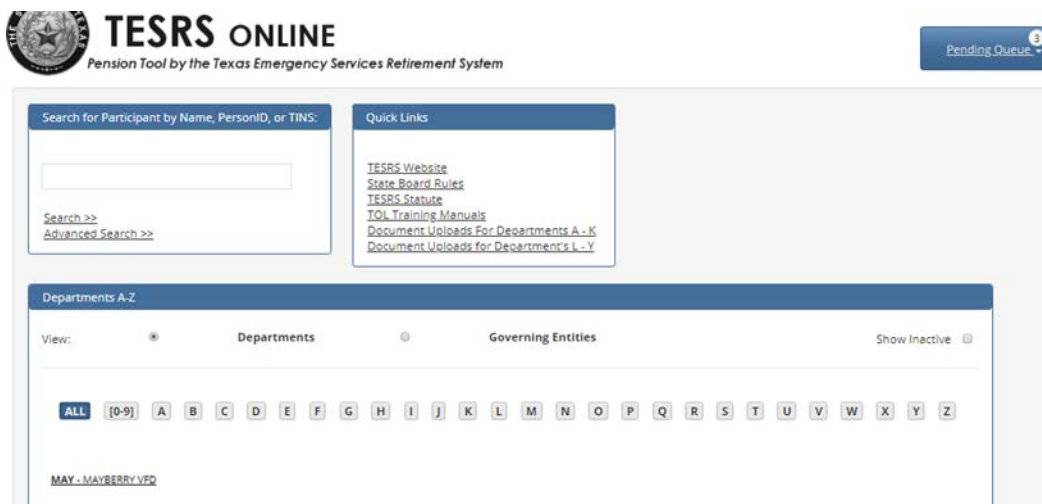
TOL was designed to allow users to quickly update pension information, and give the local board and departments greater access in the record-keeping process.

Through TOL you can complete all the tasks you regularly would as an administrator of TESRS:

- Enroll a new member,
- Terminate a member,
- Complete required reports,
- And more!

Once logged on, you will have access to your department and governing entity page. The Homepage will have links to our website and other resources, as well as a search option.

Here's an example of how the Homepage looks:



How-To: New Entry

Entering a new member is one of the most common tasks that a department user will have to complete in TOL. Since new members join volunteer fire departments all the time, creating a New Entry in TOL is an important function that ensures that the new volunteers begin receiving qualified service in TESRS and are protected by on-duty/off-duty death and disability benefits.

Once the Local Board has held a meeting to accept a member's physical certification and their 502 form, the Authorized User enters that new member into TOL.

Make a New Entry by following these steps:

1. Click the "New Entry" Button

The screenshot shows the TESRS ONLINE interface. On the left sidebar, the 'New Entry' button is highlighted with a red rectangle. The main content area displays a table of active participants with columns for Participant Name, Date of Birth, and Plan Entry Date. The table lists several participants, including 'durant, William', 'EASTWOOD, CLINT', 'FISHER, MIKE', 'PRESCOTT, RAY', and 'SANDERS, BERNIE'.

All the information outlined in red is required. You will be unable to complete the new entry process if any of these boxes are missing information.

2. Complete the new entry's personal information; Click "Add Participant"

The screenshot shows the 'Add New Participant' form. The form is divided into several sections: 'Participant Details', 'Contact Info', and 'Additional Info'. Red boxes highlight the following fields: First Name, Middle Name, Last Name, Date of Birth, Gender, Address 1, Address 2, City, State, Zip Code, Phone, Fax, Mobile, Email, Marital Status, Member Entry Date, Plan Entry Date, and Physical Fitness Date. The 'Add Participant' button is visible in the top right corner.

3. Complete beneficiary information; Print Form 502 PDF; Press “Finish”

UNKNOWN > MAYBERRY VFD

[Print Form 502](#) [Edit](#)

Participant Details			Additional Info	
First Name:	Middle Name:	Last Name:	Date of Birth:	
b	b	b	1/1/2000	
Gender:	Marital Status:		Date of Death:	
MALE	UNKNOWN			
Contact Info			Member Entry Date:	
Address 1:			11/15/2018	
Address 2:			Plan Entry Date:	
b			11/22/2018	
City:	State:	Zip Code:	Physical Fitness Date:	
b	b	111111111	11/22/2018	
Phone:	Fax:	Mobile:	QDRO on File:	
123-456-1788			No	
Email:			Need 502 Form:	
			Yes	
Account Info				
Username:				
Beneficiaries				
[No Beneficiary records exists]				
Add New Beneficiary				
Finish				

You can complete this section without the beneficiary information, however, it is strongly recommended that a member designate beneficiaries.

4. Your New Entry will remain in the pending queue until TESRS approves

STATE OF TEXAS
TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

[Summary](#) [Participants](#) [Payees](#) [Contribution Rates](#) [Contacts/Local Board](#) [Pending Queue](#) [Decedents](#)

[Print Roster](#) [New Entry](#) [Re-Enter](#) [Form 502](#) [Form 503](#) [Form 504](#)

[Pending Queue](#)

Pending Actions			
Participant Name	SSN	Requested Date	Action
Entry, New	XXX-XX-9846	6/23/2017	INSERT

Active Participants		
Participant Name	Date of Birth	Plan Entry Date
durant, william	1/1/1999	6/15/2017
EASTWOOD, CLINT	1/1/1942	6/10/2017
FISHER, MIKE	6/5/1980	6/11/2017
PRESCOTT, RAY	7/29/1993	3/1/2016
SANDERS, BERNIE	1/1/1991	1/1/2017

[Vested Terminated Participants](#)
[Non-Vested Terminated Participants](#)
[Military Leave Participants](#)
[Temporary Disability Participants](#)

TESRS © 2017

TESRS will not approve the new entry until our offices have received a completed 502 form with the Local Board Chair's approval.

How-To: Terminate a Member

From time to time members may leave your department, or they may want to stop being an active member of TESRS so they can apply for retirement. When this happens the Authorized User will be able to terminate the member from their department's pension roster.

In order to terminate a member, the Authorized User must wait for the Local Board to complete a 504 form. The 504 form lets TESRS and the Authorized User know whether or not the terminated member received any partial qualified service for the year.

The termination process follows these steps:

1. Click the name of the member you would like to terminate

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VED

Summary

Participants

Pending Actions

Participant Name	SSN	Requested Date	Action
Entry, New	XXX-XX-9846	6/25/2017	INSERT

Active Participants

Participant Name	Date of Birth	Plan Entry Date
s, a	7/7/1977	6/1/2017
durant, William	1/1/1999	6/15/2017
EASTWOOD, CLINT	1/1/1942	6/10/2017
FISHER, MIKE	6/5/1980	6/11/2017
PRESCOTT, RAY	7/29/1993	3/1/2016
SANDERS, BERNIE	1/1/1991	1/1/2017

Vested Terminated Participants

Non-Vested Terminated Participants

Military Leave Participants

Temporary Disability Participants

Print Roster
New Entry
Re-Enter
Form 502
Form 503
Form 504

2. Click on the "Terminate" button

UNKNOWN > MAYBERRY VED > KEVIN DURANT

Participant Summary

Edit

Participant Details

First Name: Kevin Middle Name: Last Name: Durant

Gender: Male Marital Status: Unknown

Contact Info

Address 1: 2777 N Stemmons, Suite 1025 Address 2:

City: Dallas State: Texas Zip Code: 75207

Phone: 123-456-7890 Fax: Mobile:

Email:

Additional Info

Person ID: 47588

Account Status: Active

Date of Birth: 1/1/1999

Date of Death:

Member Entry Date: 10/1/2018

Plan Entry Date: 10/1/2018

Physical Fitness Date: 10/1/2018

Eligible to Retire: No

QDRO on File:

Print Form 502
Print Form 503
Terminate
Disable
On-Duty Death
Off-Duty Death
Military Duty Leave

3. List the termination date; Report on partial service; Press Save

The screenshot displays the 'Terminate' dialog box for a member named Kevin Durant. The dialog box has a title bar 'Terminate' and two buttons: 'Cancel' and 'Save'. It contains the following fields and options:

- Termination Date:** A text input field with a red border.
- Partial Service Entry:** A section with two checkboxes:
 - ☐ Did this member attend 25% of emergencies?
 - ☐ Did this member attend 20 hours of training?
- Notes:** A text area with a 'characters left: 1000' indicator.

The background shows the member's profile for Kevin Durant, including personal details, contact information, and additional info.

Participant Summary	Participant Details	Additional Info
Benefit	First Name: Kevin	Person ID: 47588
Service	Gender: Male	Account Status: Active
Event History	Contact Info	Date of Birth: 1/1/1999
Print Form 502	Address 1: 2777 N Stemmons, Suite 1025	Date of Death:
Print Form 503	City: Dallas	Member Entry Date: 10/1/2018
Terminate	Phone: 123-456-7890	Plan Entry Date: 10/1/2018
Disable	Fax:	Physical Fitness Date: 10/1/2018
On-Duty Death	Mobile:	Eligible to Retire: No
Off-Duty Death	Email:	QDRO on File: No
Military Duty Leave		Need 502 Form: Yes

Remember to mark the qualified service boxes if the member “attended 25% of emergencies” or “attended 20 hours of training”

- Member will be listed in pending queue as a “Terminate” action

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

Pending Queue

Pending Actions

Participant Name	SSN	Requested Date	Action
J, A	XXX-XX-7456	6/26/2017	TERMINATE
Entry, New	XXX-XX-9846	6/23/2017	INSERT

Active Participants

Participant Name	Date of Birth	Plan Entry Date
J, A	7/7/1977	6/1/2017
durant, William	1/1/1999	6/15/2017
EASTWOOD, CLINT	1/1/1942	6/10/2017
FISHER, MIKE	6/5/1980	6/11/2017
PRESCOTT, RAY	7/29/1993	3/1/2016
SANDERS, BERNIE	1/1/1991	1/1/2017

Terminated Participants

- Vested Terminated Participants
- Non-Vested Terminated Participants
- Military Leave Participants
- Temporary Disability Participants

Navigation Links: Summary, Participants, Payees, Contribution Rates, Contacts/Local Board, Pending Queue, Deceaseds, Print Roster, New Entry, Re-Enter, Form 502, Form 503, Form 504.

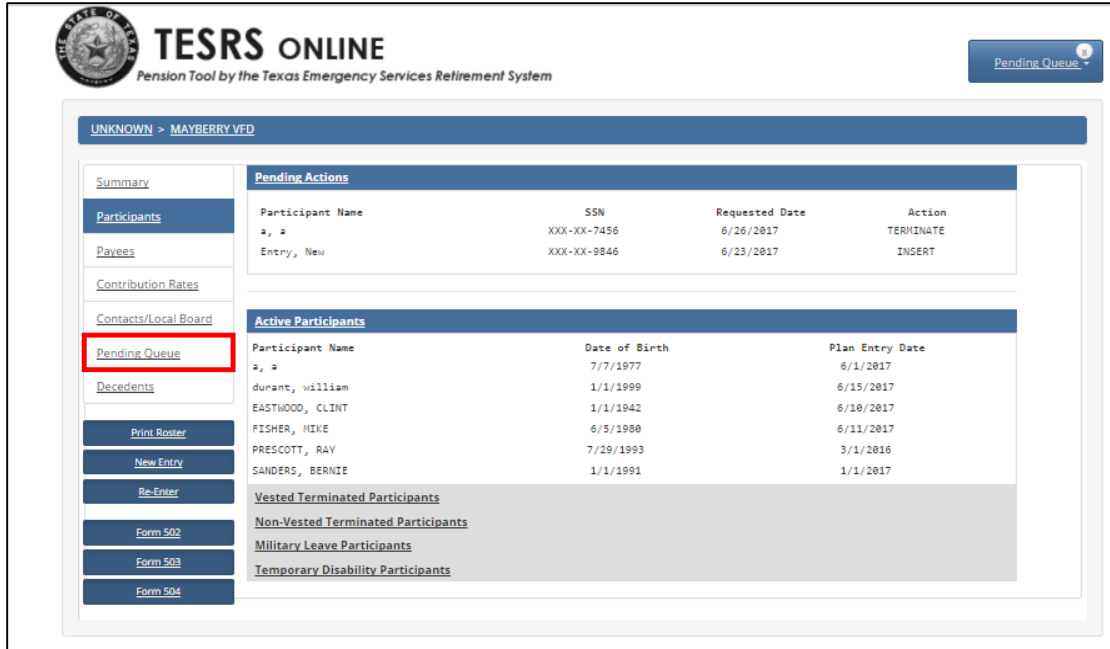
TESRS will not accept the termination until our offices have received a completed 504 form with the Local Board Chair's approval.

How-To: Membership Reconciliation Report

Throughout the year, the Local Board will have to complete reports which are required by the Executive Director of TESRS. One of these required reports is the Membership Reconciliation (MRR), which is necessary for our offices to keep track of the active members of the system. This report is extremely important for the Department and the Governing Entity as it will affect the billing process.

Complete an MRR by following these steps:

1. Check your Pending Queue for an MRR



TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

Pending Queue

Participant Name	SSN	Requested Date	Action
a, a	XXX-XX-7456	6/26/2017	TERMINATE
Entry, New	XXX-XX-9846	6/23/2017	INSERT

Active Participants

Participant Name	Date of Birth	Plan Entry Date
a, a	7/7/1977	6/1/2017
durant, William	1/1/1999	6/15/2017
EASTWOOD, CLINT	1/1/1942	6/10/2017
FISHER, MIKE	6/5/1980	6/11/2017
PRESCOTT, RAY	7/29/1993	3/1/2016
SANDERS, BERNIE	1/1/1991	1/1/2017

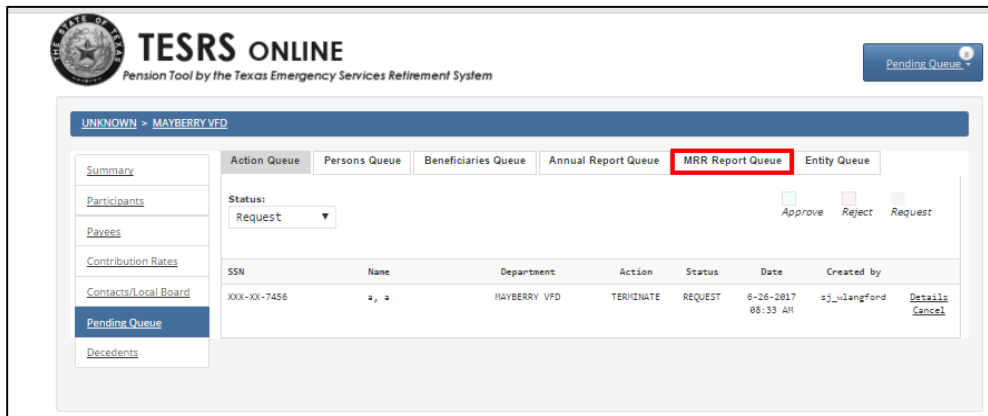
Vested Terminated Participants

Non-Vested Terminated Participants

Military Leave Participants

Temporary Disability Participants

2. Click on “MRR Report Queue”



TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

MRR Report Queue

Status: Request

Approve Reject Request

SSN	Name	Department	Action	Status	Date	Created by
XXX-XX-7456	a, a	MAYBERRY VFD	TERMINATE	REQUEST	6-26-2017 08:33 AM	sj_vlangford

[Details](#) [Cancel](#)

3. Select the most recent MRR with “Sent to Department” status

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

Pending Queue

Summary
Participants
Payees
Contribution Rates
Contacts/Local Board
Pending Queue
Decedents

Action Queue Persons Queue Beneficiaries Queue Annual Report Queue **MRR Report Queue** Entity Queue

Billing Deadlines

Quarter	Start Date	End Date	TESRS Sends MRR to Department	Update Deadline Before Invoice	Invoice Date	TESRS ACH Date
1	9/1/2016	11/30/2016	11/1/2016	11/22/2016	11/30/2016	12/30/2016
2	12/1/2016	2/28/2017	2/1/2017	2/22/2017	2/28/2017	3/30/2017
3	3/1/2017	5/31/2017	5/1/2017	5/22/2017	5/31/2017	6/30/2017
4	6/1/2017	8/31/2017	8/1/2017	8/22/2017	8/31/2017	9/30/2017

Department	Created On	Due Date	Status	Comments
MAYBERRY VFD	5/31/2017	5/22/2017	Sent to Department	
MAYBERRY VFD	3/28/2017	2/22/2017	Draft Generated	Reproduced by Pension Live
MAYBERRY VFD	11/01/2016	12/31/2016	Invoiced	
MAYBERRY VFD	9/22/2016	11/21/2016	Invoiced	
MAYBERRY VFD	9/22/2016	11/21/2016	Invoiced	
MAYBERRY VFD	9/20/2016	11/19/2016	Invoiced	
MAYBERRY VFD	9/20/2016	11/19/2016	Invoiced	
MAYBERRY VFD	9/20/2016	11/19/2016	Invoiced	
MAYBERRY VFD	2/17/2016	4/17/2016	Invoiced	

4. Review Bill Summary; Approve MRR if correct; Reject if incorrect;

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

Pending Queue

Billing

Approve MRR
Reject MRR
Print PDF
Cancel

Bill Information

MAYBERRY VFD		SUB TOTALS		Comments From Department:
Bill Date:	5/31/2017	411:	\$4,750.00	
Invoice:	2017014101	258:	\$0.00	
Billing Period:	3/1/2017 to 5/31/2017	Prior Service:	\$0.00	
Created:	5/31/2017	Interest:	\$0.00	
Printed:	5/31/2017	Penalties:	\$500.00	
Finalized:		Refunds:	\$0.00	
Due:	5/22/2017	Total Bill:	\$5,250.00	

Part II Summary

Contribution Rate:	Part II Rate:	Adjusted Contribution Rate:
\$125.00	0.00 %	\$125.00
Active Contributions (without Part II):	Total Part II Increase:	Active Contributions (with Part II):
\$4,750.00	\$0.00	\$4,750.00

- If you reject the MRR, TESRS will generate a corrected MRR

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MAYBERRY VFD

Summary
Participants
Payees
Contribution Rates
Contracts/Local Board
Pending Queue
Decedents

Action Queue | Persons Queue | Beneficiaries Queue | Annual Report Queue | **MRR Report Queue** | Entity Queue

Billing Deadlines

Quarter	Start Date	End Date	TESRS Sends MRR to Department	Update Deadline Before Invoice	Invoice Date	TESRS ACH Date
1	9/1/2016	11/30/2016	11/1/2016	11/22/2016	11/30/2016	12/30/2016
2	12/1/2016	2/28/2017	2/1/2017	2/22/2017	2/28/2017	3/30/2017
3	3/1/2017	5/31/2017	5/1/2017	5/22/2017	5/31/2017	6/30/2017
4	6/1/2017	8/31/2017	8/1/2017	8/22/2017	8/31/2017	9/30/2017

Department	Created On	Due Date	Status	Comments
MAYBERRY VFD	5/31/2017	5/22/2017	Regeneration Requested	
MAYBERRY VFD	3/28/2017	2/22/2017	Draft Generated	Reproduced by Pension Live
MAYBERRY VFD	11/01/2016	12/31/2016	Invoiced	
MAYBERRY VFD	9/22/2016	11/21/2016	Invoiced	
MAYBERRY VFD	9/22/2016	11/21/2016	Invoiced	

- Accept the MRR, or accept a corrected MRR

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

Billing

Approve MRR
Reject MRR
Print PDF
Cancel

Bill Information

MAYBERRY VFD

Bill Date: 5/31/2017
Invoice: 2017014101
Billing: 3/1/2017 to
Period: 5/31/2017
Created: 6/26/2017
Printed: 6/26/2017
Finalized:
Due: 5/22/2017

SUB TOTALS

411:	\$6,625.00
258:	\$0.00
Prior Service:	\$0.00
Interest:	\$0.00
Penalties:	\$500.00
Refunds:	\$0.00
Total Bill:	\$7,125.00

Comments From Department:

Part II Summary

Contribution Rate:	Part II Rate:	Adjusted Contribution Rate:
\$125.00	0.00 %	\$125.00
Active Contributions (without Part II):	Total Part II Increase:	Active Contributions (with Part II):
\$6,625.00	\$0.00	\$6,625.00

Bill Details

7. Check for approval of the MRR in the “MRR Report Queue”

TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

UNKNOWN > MRR REPORTS

Pending Queue

Summary Participants Payees Contribution Rates Contacts/Local Board **Pending Queue** Decedents

Action Queue Persons Queue Beneficiaries Queue Annual Report Queue **MRR Report Queue** Entity Queue

Billing Deadlines

Quarter	Start Date	End Date	TESRS Sends MRR to Department	Update Deadline Before Invoice	Invoice Date	TESRS ACH Date
1	9/1/2016	11/30/2016	11/1/2016	11/22/2016	11/30/2016	12/30/2016
2	12/1/2016	2/28/2017	2/1/2017	2/22/2017	2/28/2017	3/30/2017
3	3/1/2017	5/31/2017	5/1/2017	5/22/2017	5/31/2017	6/30/2017
4	6/1/2017	8/31/2017	8/1/2017	8/22/2017	8/31/2017	9/30/2017

Department	Created On	Due Date	Status	Comments
HAYBERRY VPD	6/26/2017	5/22/2017	Approved by Department	
HAYBERRY VPD	6/15/2017	8/22/2017	Approved by Department	part ii contribution rate
HAYBERRY VPD	3/28/2017	2/22/2017	Draft Generated	Reproduced by Pension Live
HAYBERRY VPD	11/01/2016	12/31/2016	Invoiced	
HAYBERRY VPD	9/22/2016	11/21/2016	Invoiced	
HAYBERRY VPD	9/22/2016	11/21/2016	Invoiced	

Once approved, a department user will be unable to change the MRR. If you forget to include a member or remove someone, call (512)-936-3372 for assistance.

How- To: Search for Members

Basic Search

From the Home Page you may search by Participant Name, Person ID or TINS.

Search for a Member by following these steps:

1. Click in the Search Text Box
2. Enter a Participant's Name or Person ID
3. Review Search Results

The screenshot displays the TESRS ONLINE interface. At the top left is the Texas State Seal and the text "TESRS ONLINE Pension Tool by the Texas Emergency Services Retirement System". At the top right is a "Pending Queue" button with a notification icon. The main content area is divided into three sections. The left section, titled "Search for Participant by Name, PersonID, or TINS:", contains a search text box and two buttons: "Search >>" and "Advanced Search >>". The middle section, titled "Quick Links", lists several links: "TESRS Website", "State Board Rules", "TESRS Statute", "TOL Training Manuals", "Document Uploads For Departments A - K", and "Document Uploads for Department's L - Y". The right section, titled "Departments A-Z", features a "View:" dropdown menu with "Departments" selected, a "Governing Entities" dropdown menu, and a "Show Inactive" checkbox. Below these are two rows of letter buttons: "ALL", "[0-9]", and "A" through "Z". At the bottom of this section, the text "MAY - MAYBERRY VFD" is displayed.

Advanced Search

This is a new feature that allows you to search by a combination of the following data. The search results should return those Members, Payees and/or Beneficiaries who meet ALL of the search criteria entered. All other functionality should work in the same manner as a Basic Search the results are limited to individuals in/related to your department.

Search for a Member by following these steps:

1. Click in the Search Text Box
2. Enter a Participant's First, Last Name, Date of Birth or Phone Number.
3. Click on the Search Link
4. Review Search Results

The screenshot displays the TESRS ONLINE interface. At the top left is the Texas State Seal and the text "TESRS ONLINE Pension Tool by the Texas Emergency Services Retirement System". At the top right is a "Pending Queue" button with a notification icon. The main content area is divided into two sections. The left section, titled "Search for Participant by First Name, Last Name, and Date of Birth:", contains four input fields: "First Name:", "Last Name:", "Date of Birth:", and "Phone Number:". Below these fields are two buttons: "Search >>" (highlighted in yellow) and "Basic Search >>". The right section, titled "Quick Links", contains a list of links: "TESRS Website", "State Board Rules", "TESRS Statute", "TOL Training Manuals", "Document Uploads For Departments A - K", and "Document Uploads for Department's L - Y". Below these sections is a "Departments A-Z" section with a "View:" dropdown menu set to "Departments" and a "Show Inactive" checkbox. Below the menu is a row of buttons for each letter of the alphabet (A-Z) and a button for "ALL". Below the row of buttons is a link for "MAY - MAYBERRY VFD".

How-To: Annual Reports

Annually, there is a required report that must be completed by the Local Board and online by the Authorized User. This online Annual Report will submit to TESRS which members received qualified service, which is extremely important for active members trying to vest for retirement. Annual Reports are due no later than End of Business on January 31st.

In order to start an Annual Report, the Authorized User must ensure that the Local Board members are correctly listed in TOL.

To find where your local board is listed, follow these steps:

1. Click "Contacts/Local Board"

The screenshot shows the TESRS ONLINE web application. The header includes the State of Texas seal, the text 'TESRS ONLINE', and the subtitle 'Pension Tool by the Texas Emergency Services Retirement System'. A 'Pending Queue' button is in the top right. The left sidebar contains a menu with the following items: Summary, Participants, Payees, Contribution Rates, **Contacts/Local Board** (highlighted with a red box), Pending Queue, and Decedents. Below these are buttons for Print Roster, New Entry, Re-Enter, Form 502, Form 503, and Form 504. The main content area shows 'Pending Actions' with 'No pending actions' and a table of 'Active Participants'.

Participant Name	Date of Birth	Plan Entry Date
0, 0	7/7/1977	6/1/2017
durant, william	1/1/1999	6/15/2017
EASTWOOD, CLINT	1/1/1942	6/10/2017
Entry, New	1/1/1988	6/1/2017
FISHER, MIKE	6/5/1988	6/11/2017
PRESCOTT, RAY	7/29/1993	3/1/2016
SANDERS, BERNIE	1/1/1991	1/1/2017

Below the active participants table, there are links for 'Vested Terminated Participants', 'Non-Vested Terminated Participants', 'Military Leave Participants', and 'Temporary Disability Participants'.

2. Review your list of local board members

Title	Name	Term Start Date	Term End Date	Representation	✓	✗
Chairman	NOLEN, MIKE	6/15/2016	6/15/2018	Firefighter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Secretary	New, Contact	6/15/2017	6/15/2019	Firefighter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trustee	BRANDENBURG, LISA	6/15/2016	6/15/2018	Government	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trustee	NAVARETTE, MARIANA	6/15/2017	6/15/2019	Civilian	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trustee	SMITH, BOYD	6/15/2016	6/15/2018	Civilian	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vice-Chairman	FUENTES, PEDRO	6/15/2017	6/15/2019	Firefighter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Name	Contact Type	Phone	Email
NOLEN, MIKE	CHAIRMAN	940-241-3992	NOLEN_MI@YAHOO.COM

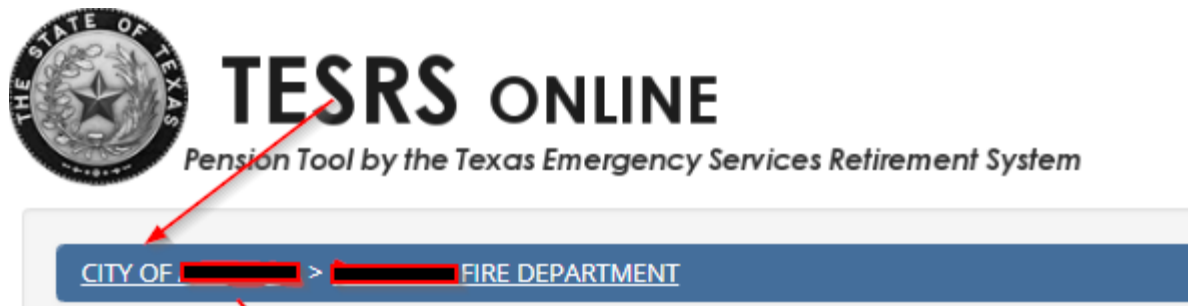
Add New Contacts

If an update the Local Board list is needed, create a New Contact before assigning Local Board terms and titles. The names added to the Contact list will help you complete the Local Board section of the Annual Report.

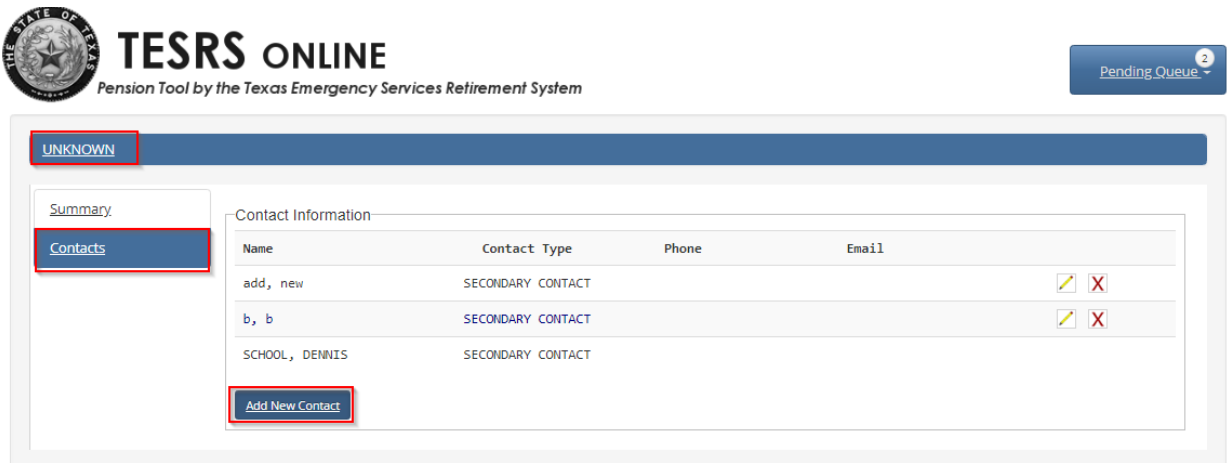
1. Select the Sub Menu located Under the TESRS Online (Pension Tool by the Texas Emergency Services Retirement System) heading. The Sub Menu is located in the blue header in white text. My example has an “UNKNOWN” Governing Entity Name. Your link will have Your City’s Name or ESD. Please review the second screen print for reference.

Second screen print below for example on how to Add a Contact.

From the Sub Menu select the *City of* (Your City) link below.



2. Click on Contacts on the left hand side then Click on Add New Contact Button



3. Enter data in Contact Pop-Up screen.

Side Note: Do not enter data within the User account information field under Username heading at this time.

(Image below for Step #3)

Add New Contact

[Cancel](#) [Add Contact](#)

Contact Details

First Name: Middle Name: Last Name:

Contact Type: PRIMARY CONTACT ▼

User account information

Username:

Contact Info


Address 1: Address 2:

City: State: Zip Code:

Phone: Fax: Mobile:

Email:

- Continue Adding New Contacts until all your Local Board Members are listed below in Contact Information text box.

 **TESRS ONLINE**
Pension Tool by the Texas Emergency Services Retirement System

[Departments A-Z](#) [Billing](#) [Payroll](#) [Pending Queue ²⁸¹](#) [Administration ▼](#)







UNKNOWN

[Summary](#)

[Contacts](#)

[Pending Queue](#)

Contact Information

Name	Contact Type	Phone	Email
add, new	SECONDARY CONTACT		 
b, b	SECONDARY CONTACT		 
SCHOOL, DENNIS	SECONDARY CONTACT		 

[Add New Contact](#)

Side Note: Staff must Approve any New Contacts. Please review the Entity Queue for Staff approval.

Once all data is completed then Click on the Name of Your City and under Departments click on your Department name. This will take you back to your Department Participapant Roster.

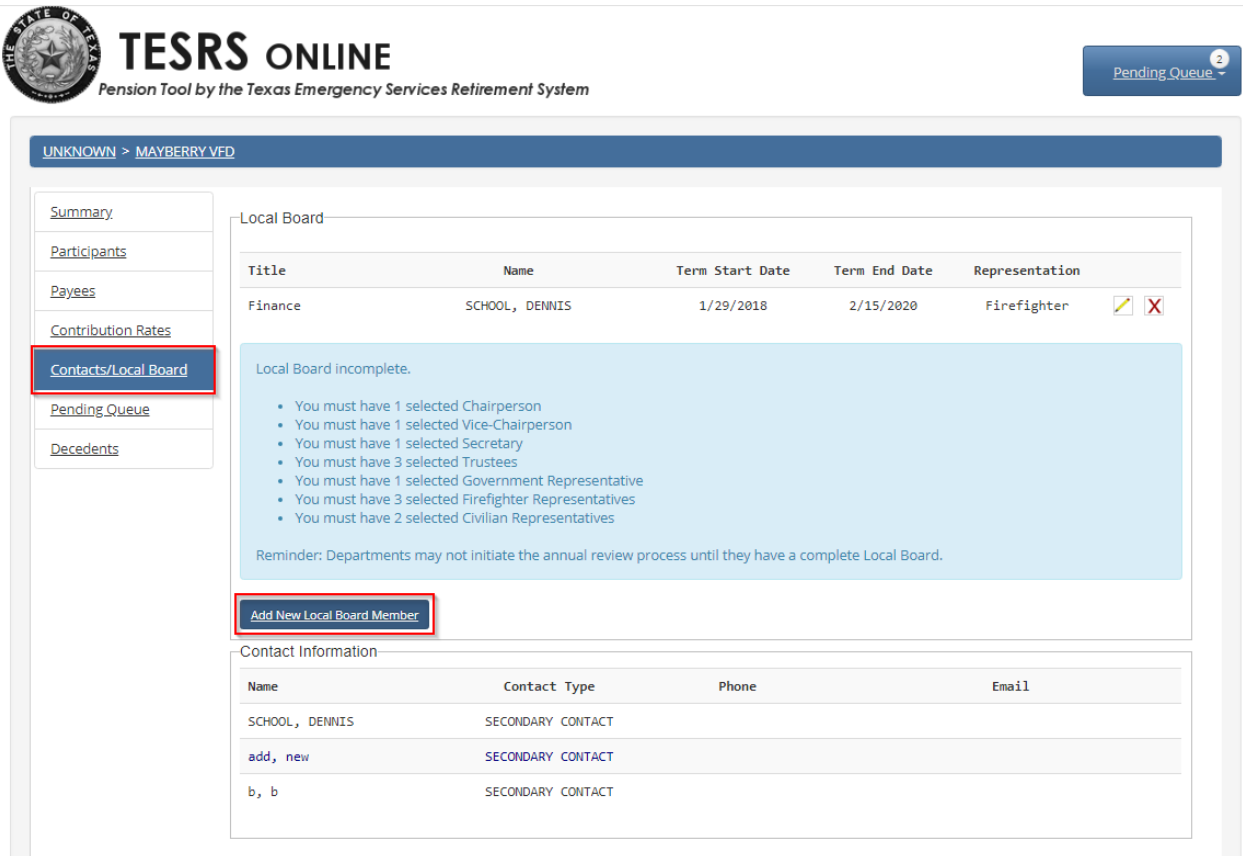
Side Note: For my example, Unknown is the City Name and the Department is Mayberry VFD.

Departments	
PRESTON PENINSULA FIRE DEPARTMENT	INACTIVE
MADISON CO VOL FIRE DEPT	INACTIVE
EL PASO CO ESD #2	INACTIVE
MAYBERRY VFD	ACTIVE
WELLINGTON TLFRA	INACTIVE
JEFF DAVIS COUNTY ESD#1	INACTIVE

Add Local Board Terms and Statutory Title

The Annual Report Local Board section must be updated as Local Board Members rotate terms, positions or new members join the board.

1. To add, delete, or update terms, click on the Contacts/Local Board link from the left hand side of the Navigation bar then select the Add New Local Board Member button.



TESRS ONLINE
Pension Tool by the Texas Emergency Services Retirement System

Pending Queue ²

UNKNOWN > MAYBERRY VFD

Summary
Participants
Payees
Contribution Rates
Contacts/Local Board
Pending Queue
Decedents

Local Board

Title	Name	Term Start Date	Term End Date	Representation
Finance	SCHOOL, DENNIS	1/29/2018	2/15/2020	Firefighter

Local Board incomplete.

- You must have 1 selected Chairperson
- You must have 1 selected Vice-Chairperson
- You must have 1 selected Secretary
- You must have 3 selected Trustees
- You must have 1 selected Government Representative
- You must have 3 selected Firefighter Representatives
- You must have 2 selected Civilian Representatives

Reminder: Departments may not initiate the annual review process until they have a complete Local Board.

Add New Local Board Member

Contact Information

Name	Contact Type	Phone	Email
SCHOOL, DENNIS	SECONDARY CONTACT		
add, new	SECONDARY CONTACT		
b, b	SECONDARY CONTACT		

2. Enter data in the New Local Board Member Pop-Up text box.

New Local Board Member

[Cancel](#) [Add](#)

Title: Finance

Contact: SCHOOL, DENNIS

Representation: Firefighter

Term Start Date:

Term End Date:

- You must have 3 selected Firefighter Representatives
- You must have 2 selected Civilian Representatives

Reminder: Departments may not initiate the annual review process until they have a complete Local Board.

[Add New Local Board Member](#)

UNKNOWN > MAYBERRY VFD

New Local Board Member

[Cancel](#) [Add](#)

Title: Finance

Contact: SCHOOL, DENNIS

Representation: Firefighter

Term End Date:

- 1 selected Chairperson
- 1 selected Vice-Chairperson
- 1 selected Secretary
- 3 selected Trustees
- 1 selected Government Representative
- 3 selected Firefighter Representatives
- 2 selected Civilian Representatives

Departments may not initiate the annual review process until they have a complete Local Board.

[Add New Local Board Member](#)

Side Note: Your Local Board is not complete until you have a Chair, Vice-Chair, Secretary, and 3 Trustees listed as the Local Board Representation. The Title of each person must be a: Government, Firefighter and Civilian Representatives

Local Board

Title	Name	Term Start Date	Term End Date	Representation
Finance	SCHOOL, DENNIS	1/29/2018	2/15/2020	Firefighter

Local Board incomplete.

- You must have 1 selected Chairperson
- You must have 1 selected Vice-Chairperson
- You must have 1 selected Secretary
- You must have 3 selected Trustees
- You must have 1 selected Government Representative
- You must have 3 selected Firefighter Representatives
- You must have 2 selected Civilian Representatives

Reminder: Departments may not initiate the annual review process until they have a complete Local Board.

Add New Local Board Member

Annual Report

Close

Request Extension

Request Rework

Please complete your local board. [Go To Local Board](#)

MAYBERRY VFD

Due Date: 1/31/2019

Instructions: For each participant listed below, please indicate whether or not this participant met at least 25% of emergencies and at least 20 hours of training. If this department's local board is incomplete, then please go to the local board page first and update the information where necessary.

Comments:

characters left: 1000

No. Participant	Emergencies	Training	Qualified
-----------------	-------------	----------	-----------

How to Review and Complete the Annual Report

Once you have verified that your local board is correct, you are now able to proceed with your Annual Report.

1. Select the Annual Report Queue tab from the Pending Queue.

The screenshot shows the TESRS ONLINE interface. The left sidebar has a menu with options: Summary, Participants, Payees, Contribution Rates, Contacts/Local Board, Pending Queue (highlighted with a red box), and Decedents. The top navigation bar includes links for Departments A-Z, Billing, Payroll, Pending Queue (with a notification badge), and Administration. Below this, there are tabs for Action Queue, Persons Queue, Beneficiaries Queue, Annual Report Queue (highlighted with a red box), MRR Report Queue, and Entity Queue. The main content area shows a 'Status:' dropdown set to 'Request' and buttons for Approve, Reject, and Request. A message '[No pending queue]' is displayed in the center.

2. Select the Details link to view your Active participants or you may select the print link to review a hard copy (PDF) of the Annual Report for reference.

Action Queue	Persons Queue	Beneficiaries Queue	Annual Report Queue	MRR Report Queue	Entity Queue
<div> <input type="checkbox"/> Approved </div>					
Description	Date	Department	Change Date	Changed By	Status
Mayberry 2017	01/01/2017 To 31/12/2017	MAYBERRY VFD	1/30/2018	WLangford	START
					Details Print

3. If an Active member is not listed in your Participant list or a member needs to be terminated, select the Request Rework button for TERS staff may refresh the Annual Report detail. *ALL requests within the Person Queue and the Action Queue must be processed before submitting the Annual Report.*

Annual Report

[Close](#)

[Request Extension](#)

[Request Rework](#)

[Save](#)

[Submit](#)

MAYBERRY VFD

Due Date: 1/31/2018

Instructions: For each participant listed below, please indicate whether or not this participant met at least 25% of emergencies and at least 20 hours of training. If this department's local board is incomplete, then please go to the local board page first and update the information where necessary.

Staff Comments: tesrs test

Comments:

characters left: 1000

No.	Participant	Emergencies	Training	Qualified
1	ab, a	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	BOB, JO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	durant, william	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	KONG, DONKEY JR.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Mailout, Test For	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	PRESCOTT, RAY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	smith, bob	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	STEVENS, BEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	test, jessica	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- If you are satisfied with your Participant List and selections click the Submit Button. No further changes can be made to the report after submitted.

Annual Report

[Close](#)

[Request Extension](#)

[Request Rework](#)

[Save](#)

[Submit](#)

MAYBERRY VFD

Due Date: 1/31/2018

Instructions: For each participant listed below, please indicate whether or not this participant met at least 25% of emergencies and at least 20 hours of training. If this department's local board is incomplete, then please go to the local board page first and update the information where necessary.

Staff Comments: tesrs test

Comments:

characters left: 1000

No.	Participant	Emergencies	Training	Qualified
1	ab, a	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	BOB, JO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	durant, william	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. A Board Meeting Date and the Presiding Officer field must be entered in order to be approved by the agency.

Annual Report

Close

Board Meeting Date:

Presiding Officer:

Confirm the annual report submission?

Do not click the YES button if you have pending items in the pending queue!!

YesNo

MAYBERRY VFD

Due Date: 1/31/2018

Instructions: For each participant listed below, please indicate whether or not this participant met at least 25% of emergencies and at least 20 hours of training. If this department's local board is incomplete, then please go to the local board page first and update the information where necessary.

Staff Comments: tesrs test

Comments:

6. Click on the Annual Report Queue tab within the Pending Queue to Review the Status column to verify the Annual Report has been Submitted. You may print a copy for your records if needed. Check your Annual Report Queue Daily. The Annual Report is complete once the status is updated to be Approved by the agency.

Action Queue	Persons Queue	Beneficiaries Queue	Annual Report Queue	MRR Report Queue	Entity Queue
<div> <input type="checkbox"/> Approved </div>					
Description	Date	Department	Change Date	Changed By	Status
Mayberry 2017	01/01/2017 To 31/12/2017	MAYBERRY VFD	12/19/2018		SUBMIT
					Print