

# Texas Emergency Services Retirement System



Frank Torres, Chairman  
Kevin Deiters, Executive Director

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## Memorandum

TO: TESRS Departments  
FROM: Kevin Deiters, Executive Director  
DATE: December 28, 2018  
RE: Reporting Instructions for 2018 Annual Report (Due on or before January 31, 2019)

### 1. Fill Vacant Positions on the Local Board

The Local Board must have six members (3 firefighters, 1 from the governmental entity, 2 from the community).

### 2. Submit Form 602 (Local Board Membership) to Austin

This form contains the name, contact information, term and position for each Local Board member and requires the signature of the Local Board Chair. Submit the form to Austin by fax or email.

### 3. Review the accuracy of the TOL participant roster

Make sure that you clean up your pension roster in TOL before you attempt to complete the annual report. Terminate inactive members and enroll new (or missing) members into the pension system. Confirm that Austin has processed these transactions before you start the annual report.

### 4. Compile your department's training and emergency response records for calendar year 2018

Determine if each member attended 25 percent of the emergencies for the department and attended at least 20 hours of training during the calendar year. (Prorate as needed)

### 5. Confirm that your department has an authorized user of the TESRS Online Database (TOL)

Your department must have an authorized user with administrative rights to TOL to update pension system records and to complete the annual report. Take the following steps if you do not have an authorized user:

- a. Recruit one or two individuals that you can trust to serve as authorized users on TOL. These individuals should be computer literate; have a unique email address; and agree to terms of a confidentiality agreement requiring the nondisclosure of confidential information.
- b. Request the prospective authorized users review the terms and conditions of the **TESRS Confidentiality and Information Access Agreement**. If acceptable, the prospective authorized user should complete and sign the agreement and submit it to the Local Board for approval.
- c. Hold a Local Board meeting (after public meeting notice) and formally designate the authorized users for the department. The Local Board Chair should countersign the agreement and submit it to Austin for processing.

### 6. Complete the 2018 Annual Report using TOL and print a draft of the report for review by the Local Board.

### 7. Conduct a public meeting of the Local Board (after 72 hours of public notice)

During a public meeting, the Local Board should review the accuracy of the draft annual report from TOL and formally adopt its submission (with corrections as needed). The Local Board should also vote to renew the authority of its authorized users to TOL.

### 8. Make any corrections and submit the adopted 2018 Annual Report using TOL.

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Please call us at (800) 919-3372 or email us at [benefitsteam@tesrs.texas.gov](mailto:benefitsteam@tesrs.texas.gov) if you have questions.

- Forms and instructions are available at <https://www.tesrs.com/forms-publications>
- Please fax completed forms to the TESRS office at 512-936-3480.