

All Together Now

TMRS City Portal Training

Presented by

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Training Objectives



- Portal Overview
- Portal Access
- Registering Administrator and Users
- Terms of Service and Confidentiality
- Portal Demo – Online Video

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 inquiries on behalf of members
 - Account balances
 - Refund status
 - Payroll information
- Generate retirement estimates
- Run city reports
 - Vesting
 - Retirement eligibility
- Submit monthly payroll files

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 the City Correspondent or City Manager
- 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:
 1. The City
 2. The Administrator
 3. TMRS
- The city section must be signed by someone with the legal authority to sign documents on behalf of the city



City Portal Use Agreement, cont.

Administrator must agree to:

- Attend training (in person, webinar, or online)
- 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
- The 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 City Portal Administrator
 - Portal Administrator is responsible for:
 - Granting access to users
 - 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 is 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 handout)
 - 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: <https://www.tmrs.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 any User's 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

City Portal Documents

1. Cities that request access to online City Portal training (usually through TMRS City Portal Contact LaShelle Ruiz (lruiz@tmrs.com)) will be sent the URL for the online training page
2. Print and keep the **City Portal Training Manual** (either from the online training page, via e-mail PDF, or hardcopy, as in today's training session)
3. Send the signed **City Portal Use Agreement** to TMRS (see today's handout); upon receipt, TMRS will send the City Portal Administrator a URL to register for access
4. The City Portal Administrator for each city is responsible for training the city's Authorized Users (online training is easiest option)

Portal Online Training Page



Online City Portal Training

Thank you for your interest in becoming an authorized City Portal Administrator. To take part in the online training, please follow these simple steps:

1. Download and print this [City Portal Manual](#), which explains the purpose and use of the City Portal. Read this document first, and keep the printout for future reference; it will serve as your user manual.
2. Watch this short video tutorial "[City Portal Training](#)," which presents an online demo of the Portal's functionality.
3. Download and read the "[City Portal Use Agreement](#)." Obtain the proper signatures for your city and fax, mail, or e-mail the agreement to TMRS. This is an important document that requires the signature of someone authorized to sign legal documents for your city, such as your City Manager. Fax it to the attention of TMRS Portal Contact LaShelle Ruiz at 512-476-2903; or send a scanned PDF to [LaShelle Ruiz](#).
4. After we receive the signed User Agreement from you and it is also signed by a TMRS official, you will receive an e-mail from LaShelle Ruiz that contains the URL to enable you to register to use the City Portal. In this step, you will choose your username and password for Portal access.

After that, you are officially a City Portal Administrator!

If you have problems accessing any of these links, please send a note to the [TMRS webmaster](#).

Opening Page of Video

City Portal Training

An Online Tutorial From TMRS

The City Portal gives you immediate access to information about your city's TMRS plan members. Remember that individual account information is confidential under state law. If you receive a request for confidential retirement information from anyone other than the member or an authorized city official, please direct the requestor to contact TMRS.

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Portal Demonstration



- This concludes the introduction to the City Portal
- We will now proceed to the online tutorial, which demonstrates how to navigate the City Portal

QUESTIONS?