When employees first join your organization:

1. Enroll new employees in New Employee Benefits Orientation as soon as possible after hire!
   a. Retirement programs are covered in the session. Enrolling them will help answer their questions and give them information about time-sensitive benefits matters.

2. Become familiar with the differences between ORP & TRS for New Hires and Transfers with this Overview:

Why is this important?

- To help make sure the employee gets enrolled properly and within legal timeframes; often the HRL is the first point of contact and should have the basic idea of who is eligible for ORP and who must be in TRS from day one of employment. Workday has some onboarding questions asked of employees to help direct enrollment in the appropriate program, but it is still a good idea for the HRL to be familiar with the basics provided in that overview.

- To assure that non-student employees have TRS deductions on their first paycheck; if the person was previously employed with A&M or another school system or university prior to this position, the enrollment may not process correctly without intervention. Watch that first paycheck!

- If something does go wrong with the person’s TRS enrollment, there will be retroactive deductions to catch them up, and this can be an unexpected hardship on new employees. Become familiar with onboarding status reports and payroll reports to help avoid these situations!

3. Become familiar with how retirement program enrollment occurs to direct employees accurately:
   a. Be sure that your department does not promise a certain employer contribution rate or retirement program to employees in offer letters! Eligibility for mandatory programs is set by state law. In addition, contribution rates are set by law but some supplementation can vary among higher education institutions in Texas, and there are grandfathering provisions for certain contribution rates. Don’t assume someone is grandfathered based on their current employer—that institution might be doing different supplementation than Texas A&M.

   b. ORP, for those eligible to select, occurs in Workday but includes some paper forms that HROE or the HSC HR Team must process. There are specific timeframes that must be met if a person is eligible. If the employee should be eligible but doesn’t have the forms or a Workday task, send them to benefits@tamu.edu or hschr@tamu.edu.
c. Tax-Deferred Account enrollment is almost completely employee self-service in Workday. The only part that takes place outside of Workday is setting up their account with one of the approved vendors. For questions about how to enroll within Workday, contact benefits@tamu.edu or hschr@tamu.edu. Benefits Services for Texas A&M or HSC, not the Tax area of Payroll, is not the appropriate contact for ORP or TDA enrollment information or assistance.

When your employee is ready to retire:

1. Employee needs to register to attend pre-retirement workshop. https://employees.tamu.edu/benefits/retirement/workshops/
   a. Workshops are held once a month. All information is covered in regards to retiring from TAMU for retiree insurance and information for retiring from TRS or ORP.

2. Employees who are ready to retire are retiring from 2 separate entities. Become familiar with between each so you can direct employees accurately.
   a. Retire from TAMU for retiree insurance benefits.
   b. Retire from TRS or ORP for annuity payments.

3. If unsure of eligibility for retiree insurance, questions can be directed to benefits@tamu.edu or hschr@tamu.edu.
   a. Individual appointments are reserved for employees within 30 days of retirement.

4. For TRS retirement, TRS is the main point of contact to verify eligibility and application process for retirement.