

How to manage your contacts on TCDRS.org

NOTE

You need Security Administrator access rights to manage your TCDRS contacts. If you need to manage a contact and do not have access, please contact your TCDRS Employer Services Representative.

ADD A NEW CONTACT

- I. Sign in to www.TCDRS.org/Employers and click the "Contacts" link under "View" in the left menu.
- 2. Select "Add Contact".

| VIEW | CONTACTS |
|-----------------|--|
| OUR PLAN | |
| PLAN DOCUMENTS | Show: Summary Detail FILTER BY TYPE: Choose a type |
| REPORTS | ADD CONTACT > |
| CONTACTS | File_Previous 1 to 10 of 17 Next Last |
| PORTAL ACTIVITY | |
| HELP TOPICS | NAME TYPE(S) |

- **3.** Enter the required information, including the plan contact type, so that we know what communications the contact needs to receive from TCDRS.
- 4. After that, choose whether or not to give the contact access as a web portal user and what type of web portal access they should have. (Every contact does not have to have web portal access.)
- 5. Once you decide on the contact's level of access, type in a User ID for them and select "Save". (Ask them to click the activation link in the email they receive after.)

| Auditor Commissioner | Benefits Administrator | Board Member | Chief Employee |
|---|---|--|-------------------|
| Other Plan Management | Payroll Administrator | Seminar Contact | Treasurer |
| S THIS CONTACT ALS | O A PORTAL USER? | | |
| Yes No Which employer portal | role do you wish to assign | to this contact? (check a | as many as apply) |
| ♥Yes No Which employer portal ØBenefits | role do you wish to assign Decision-maker | to this contact? (check a User ID/Credentials: | is many as apply) |
| ♥ Yes No Which employer portal Ø Benefits Ø Payroll | role do you wish to assign Decision-maker | to this contact? (check a User ID/Credentials: BoDuke999 | is many as apply) |
| v Yes No Which employer portal ⊘ Benefits ⊘ Payroll | role do you wish to assign `Decision-maker | to this contact? (check a User ID/Credentials: BoDuke999 | is many as apply) |

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|---|----------|--------------------------|---------------|-------------------|-------------------|--------------|--------|
| To add a new contact, please CONTACT INFORMATION | se retur | n to the Contacts | screen and | click Ad | ld Contact. | * REQUIRED F | FIELDS |
| COURTESY TITLE: | | * FIRST NAME: | | | * PHONE: | -5555 | |
| *SALUTATION: | v | MIDDLE NAME: | | | EXTENSION | 4: | |
| •TITLE: Benefits Specialist | Ŧ | *LAST NAME: Duke | | | FAX: | · | |
| | | SUFFIX: Select Suffix | ; | • | *EMAIL: BoDuke | @BoDuke.com | |
| MAILING ADDRESS | | | PHYSIC | AL ADI | ORESS | | |
| *ADDRESS 1: | | | 🗹 SA | ME AS N | AILING ADI | DRESS. | |
| 123 Address Dr. ADDRESS 2: | | | *ADDI 123 | RESS 1: Addres | is Dr. | | |
| | | | ADDR | ESS 2: | | | |
| •CITY: Hazzard | *STAT | re: ♦ | •CITY: | | | *STATE: | |
| *ZIP: | | | Haz | zard | | тх | ¢ |
| 77777 | | | • ZIP: 999 | 99 | | | |
| | | | | | | | |

EDIT A CONTACT

Go to "Contacts" under "View" on the left menu and then select "Edit".

You can make edits to any area of the Edit contact form, except the user ID if that person has web portal access. When finished, select "Save".

If you make changes to a contact's web portal access, they will not receive an email about the change.

| CONTACTS | | | | | |
|---|--|--|--|--|--|
| Show: Summary Detail FILTER BY TYPE: Choose a type \$ ADD CONTACT } | | | | | |
| First Previous | 1 to 10 of 13 Next Last | | | | |
| NAME | TYPE(S) | | | | |
| + Bo Duke | Benefits Administrator, Payroll Edit Delete Administrator | | | | |
| + Callie Duke | Benefits Administrator, Payroll Edit Delete Administrator, Treasurer | | | | |
| + Clay Duke | Judge Edit Delete | | | | |
| + Darryl Duke | Other Plan Management Edit Delete | | | | |
| + Coy Duke | Other Plan Management Edit Delete | | | | |
| + Elba Garcia Duke | IT Contact, Seminar Contact, Edit Delete Benefits Administrator, Payroll Administrator | | | | |

DELETE A CONTACT

Go to "Contacts" under "View" on the left menu and select the "Delete" link next to the contact's name.

A window will pop up with the contact's information.

Select "Delete" to remove the contact from the list. If they had web portal access, they will no longer be able to sign in to the secure employer area.

Deleted contacts will not receive an email about their removal from the Contacts list.

Review your contacts regularly and after any staffing changes.

If you have any questions, please call TCDRS Employer Services at 800-651-3848.

| | CONTAC Show: Summary Detail FILTER BY TYPE: Choose ADD CONTACT > First Previous | TS a type \$ 1 to 10 of 18 Next Last | | |
|--|---|--|---|---------|
| | NAME | TYPE(S) | | - 1 |
| | + Bo Duke | Benefits Administrator | Edit <u>Delete</u> | |
| | + Callie Duke | Benefits Administrator, Payroll Administrator, Treasurer | Edit Delete | _ |
| | + Clay Duke | Judge | Edit Delete | _ |
| | + Darry Duke | Other Plan Management | Edit Delete | _ |
| | + Darry Duke | Other Plan Management | Edit Delete | |
| DEI | LETE CONTACT | | | CLOSE 🗙 |
| Bo D Bene Mr. Bolyl Phon Fax: | uke fits Specialist @Duke.org e: (512) 555-5555 Ext: | Mailing Address: Physical 123 Address Dr. 123 Add Hazzard County, TX 99999 Hazzard | Address: Iress Dr. County, TX 99999 | |
| c | ANCEL | | | DELETE |