



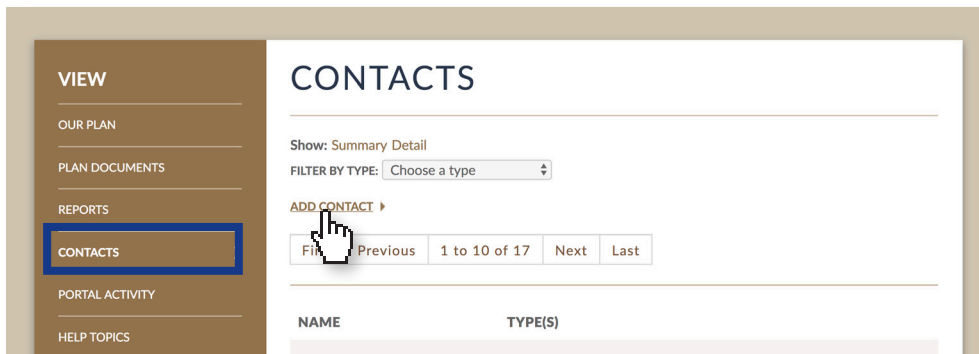
How to manage your contacts on TCDRS.org

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

1. Sign in to www.TCDRS.org/Employers and click the “Contacts” link under “View” in the left menu.
2. Select “Add Contact”.



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.)

CREATE CONTACT
CLOSE ✕

To add a new contact, please return to the Contacts screen and click Add Contact.

CONTACT INFORMATION * REQUIRED FIELDS

* COURTESY TITLE: Mr. ▾	* FIRST NAME: Bo	* PHONE: 512-555-5555
* SALUTATION: Mr. ▾	MIDDLE NAME: 	EXTENSION:
* TITLE: Benefits Specialist	* LAST NAME: Duke	FAX: _ - _ - _
SUFFIX: Select Suffix ▾	* EMAIL: BoDuke@BoDuke.com	

MAILING ADDRESS

*** ADDRESS 1:**
123 Address Dr.

ADDRESS 2:

*** CITY:** Hazzard *** STATE:** TX ▾

*** ZIP:** 99999

PHYSICAL ADDRESS

SAME AS MAILING ADDRESS.

*** ADDRESS 1:**
123 Address Dr.

ADDRESS 2:

*** CITY:** Hazzard *** STATE:** TX ▾

*** ZIP:** 99999

TCDRS PLAN CONTACT TYPE (CHECK AS MANY AS APPLY)

<input type="checkbox"/> Auditor	<input checked="" type="checkbox"/> Benefits Administrator	<input type="checkbox"/> Board Member	<input type="checkbox"/> Chief Employee
<input type="checkbox"/> Commissioner	<input type="checkbox"/> Head of Board	<input type="checkbox"/> IT Contact	<input type="checkbox"/> Judge
<input type="checkbox"/> Other Plan Management	<input checked="" type="checkbox"/> Payroll Administrator	<input type="checkbox"/> Seminar Contact	<input type="checkbox"/> Treasurer

IS THIS CONTACT ALSO A PORTAL USER?

Yes No

Which employer portal role do you wish to assign to this contact? (check as many as apply)

Benefits Decision-maker

Payroll

User ID/Credentials:
BoDuke999

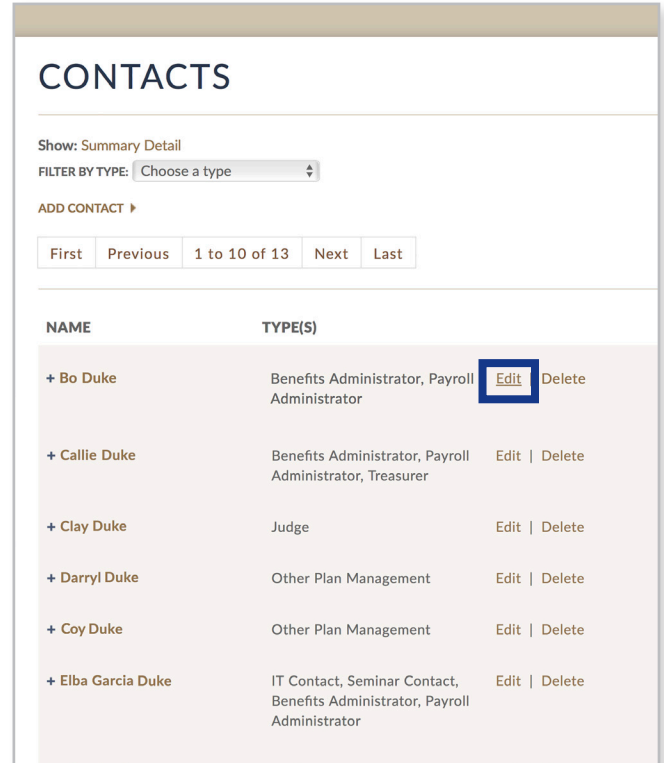
CANCEL
SAVE

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.



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.

