

Instructions for submitting an online *Exception Request Form* to TRS

1. Type and complete all highlighted fields

2. Select “Save and Submit” button

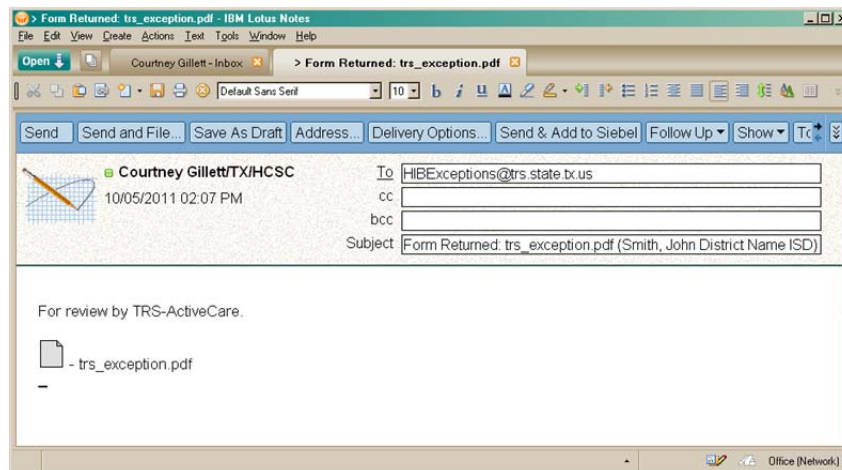
Follow prompts to save the document to your computer. The file will automatically save as a PDF document (trs_exception.pdf). For record-keeping purposes, Benefits Administrators are encouraged to **rename** the file to include the last name and first name of the affected employee, for example: Smith John_exception.pdf.

Note: Once the file is saved, you may see a screen prompt for “Select Email Client.” Select the default for “Desktop Email Application” and click “ok” to continue. Your e-mail program will appear pre-addressed to TRS and will include your *Exception Request Form* as an attachment (trs_exception.pdf).

3. Attach additional, relevant documents to support your request

Relevant supporting documentation, such as a certificate of creditable coverage (COCC), enrollment application, divorce decree, copy of death certificate, adoption papers, online enrollment documents, proof of payroll deductions or a letter from an employee requesting an exception, should be attached and submitted electronically with the *Exception Request Form* at the same time.

Important: Please add the last name and first name of the affected employee and the district name to the subject line of the e-mail to TRS after the pre-inserted file name, for example:
Form returned: trs_exception.pdf (Smith, John District Name ISD)



Tips for Submitting Exception Requests

- Do not submit a request if the action required cannot be supported by your Section 125 Cafeteria Plan.
- The *Exception Request Form* is required for all requests. Requests without a completed form will not be considered.
- *Exception Request Forms* should be submitted by Benefits Administrators. Benefits Administrators must submit the *Exception Request Form*, even if the request regards an employee error. Include a statement from the employee within the “Justification” section of the form if applicable. Although Benefits Administrators are encouraged to work with their employees and submit the *Exception Request Form* on their behalf, TRS will accept the *Exception Request Form* from the employee.
- Your request for an exception should include any written comments, documents, records, and other information you may wish to submit to support your position. Use the “Justification” box to note the coverage you want changed, added or cancelled. **Please be specific**; for example, include the plan and coverage category, effective dates of coverage, and dependent name(s) if applicable. If the “Justification” box does not allow enough space for your written comments, type in “see attached” and attach a separate file of supporting text when you submit/e-mail your form to TRS.

- You may save the *Exception Request Form* from the website or portal at any time and complete at a later date. Simply “save as” to save the file as a PDF to your computer, then, follow the steps outlined above to e-mail your request to TRS once completed. See page 31 of the Administrative Guide for instructions to submit the form to TRS by mail or by fax.
- **For districts/entities using electronic enrollment:** If there are issues that affect multiple members on a single file, the district/entity should attach an Excel spreadsheet of all members impacted with an *Exception Request Form*. For example, during open enrollment, the file to Blue Cross and Blue Shield did not include any new dependents, affecting the membership records of multiple employees. Send a spreadsheet with a list of the employees affected by the errant file with one *Exception Request Form*.