bswift

TPA TRANSFER NOTIFICATION

Districts within the Teacher Retirement System of Texas (TRS) are allowed to choose which vendor administers their benefit offerings. This form is required when a district moves to a new third-party administrator (TPA). This notification must occur once the Business Association Agreement with the new TPA has been signed.

If you are considering offering an electronic enrollment through a TPA you must contact your bswift BA Advocate by email at least 60 days prior to transfer/implementation. Send the email to <u>TRSBAInquiries@bswift.com</u> and be sure to include your signed agreement with your new TPA.

Your BA Advocate will submit documentation/notification form for review.

Region #:

District #:

District Name:

Please check the appropriate box:

- \Box Request to transfer from self-service on bswift enrollment portal to a TPA.
- Request to transfer from your current TPA to another TPA.
- □ Request to transfer from current TPA to self-service on the bswift enrollment portal.

REQUIRED INFORMATION		
Broker (if applicable):		
Current TPA:		
Current TPA Contact Name:		
Current TPA Contact Email:		
Current TPA Contact Phone:		
New TPA: This is NOT the broker – please enter the actual TPA here. Failure to do so may result in a delay in live date.		
New TPA Contact Name:		
New TPA Contact Email:		
New TPA Contact Phone:		
Effective Date of Transfer*:		
District Contact (BA) Name:		
District Contact (BA) Email:		
District Contact (BA) Phone:		

*Note: If you are changing TPAs for September 1st the new TPA is required to take over ongoing administration and production file transfers no later than July 1st in order to support the TRS-ActiveCare Annual Enrollment period.

Verify the following documentation is complete and submit to the bswift BA Advocate group:

Business Association Agreement (signed contract between District and TPA)

BENEFITS ADMINISTRATOR ELECTRONIC SIGNATURE	DATE
NEW THIRD PARTY ADMINISTRATOR ELECTRONIC SIGNATURE	DATE