TEAM PROGRAM
TRS Enterprise Application Modernization

Employer Advisory Group
Meeting Agenda

Date: 04/29/2026
Start Time: 1:30 PM
End Time: 3:00 PM
Location: Microsoft Teams

Type of meeting: Quarterly Meeting
Meeting called by: **David Green**
Minutes by: David Green
Invitees: ~~Adam Fambrough~~, ~~Ashley Conrad~~, ~~Barbie Pearson~~, Brandi Gardner, ~~Brianna Hunter~~, ~~Catarina Saucedo~~, ~~Chris Cutler~~, Jennifer Almanza, ~~Jennifer Gasior~~, Leslie Barron, Mark Chi, ~~Megan Van Winkle~~, Nathan Farmer, Nicholas Gonzalez, Katie Tucker, ~~Kevin Wakley~~, Yvette Carter
Additional Invitees: Jennifer Moen

Non-Higher Education EAG Members and designated participants:

~~**Christine Porter**~~	Spring Branch ISD		~~**Lynn Nicholson**~~	Mason ISD	
Claudia Alba	ESC 12		~~**Mary Irvin**~~	ESC Region 8	
Claudia Wilko	Northside ISD		~~**Mary Ramon**~~	Northside ISD	
Fran Whitaker	Judson ISD		**Mickey Smith**	Crandall ISD	
~~**Ginger Gamble**~~	North East ISD		**Rachel Jimenez**	Conroe ISD	
~~**Jeffrey Coats**~~	North East ISD		~~**Sherry McGraw**~~	Sulphur Springs ISD	
~~**Judy Como**~~	Judson ISD		~~**Tera Harris**~~	Spring Branch ISD	
Kamray Runnels	Pflugerville ISD		**Theresa Zlotopolski**	Clint ISD	
~~**Kathy Henderson**~~	Aransas County ISD		**Tonya Davis**	TASBO	
Lori Johnson	Hutto ISD				

Other Attendees not listed: Shennel MaloneLedoux, Spring Branch ISD

Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent Reporting Employers from all over the State and all types of employers. They serve as the collective "voice" of all R.E.'s.

Expected Outcome: Questions and concerns expressed by members of the EAG will be addressed. EAG members are expected to share information with other employers in their region and bring questions and concerns from *those employers to this group.*

TEAM PROGRAM

TRS Enterprise Application Modernization

Please…

- ✓ *Mute your speaker to avoid sharing background noise*
- ✓ *Do not put this call on hold*

AGENDA

- **Questions / topics from EAG members**
- **Information from TRS:**
  - **Employer Engagement Plan (Yvette Carter)**
    - Member Education will share information regarding the Employer Engagement Plan.
    - Want to know if EAG group has feedback or ideas related to the topics we are going to address. Making sure they understand the purpose and reaching out to their HR contacts to help provide the tools/information to provide their employees.
    - Please email Yvette.Carter@trs.texas.gov with any feedback. [Shared images from a document of resources, not yet available.]
      - Lorinda Johnson- This is great. So many times I paste your contact number. I receive many questions including: "How do I pull my funds out?" or they have paperwork, but they ask for help to fill it out, and I refer them to a counselor.
      - Yvette Carter-we have one resource to help them with the retirement process. We want to help them to understand their benefits earlier in their career.
      - Lorinda- how do I get to "how do I request a refund" document?
      - Yvette- this hasn't been published yet, but there will be a page dedicated to it on the website, and it will link to MyTRS.
      - Lorinda-thank you.
      - Mark Chi- Yvette, would you like to address the pilot?
      - Yvette-yes, we want to figure out who is requesting information, so we can develop relationships to create meetings in person or virtual. We will focus on a few regions, starting where we have our offices and expanding across the state in time. We want to meet with the contact persons and make ourselves available.
      - Mark-it's really a multi-pronged approach. Earlier this year, and every couple of months, our Ombuds presented guidance and videos. We're trying to find ways to partner with you, get in front of your employees to better educate them on what TRS is all about. New members don't always

understand the deductions, for example. This is what Yvette's team is trying to do, bring education to the members.

- Lorinda-I'd add, I like the "watch and learn" posters. In my experience HR doesn't get involved with TRS much, they always come to payroll. We'd love if you would reach out to HR more to get ahead of the questions.
- Claudia Wilko-I agree, contact groups like HR & payroll. The main contacts are payroll, and HR should be more involved. All the questions for TRS come to us in Payroll. Re: payroll deduction questions, we get questions about opting out because members don't plan to retire with TRS. We must explain the options or lack of option to opt out, regardless of time spent in the position. We tell them they can withdraw after they leave the covered position. They're not aware of their options. Please include this information for the employees.
- Yvette- we can be sure to include that as part of an overview of TRS and how it all works.
    - Please add the HR contacts in your feedback, whoever you have that we can help to understand the TRS benefits. Add this information in the portal to the contact list, that's who we will contact.
    - Claudia Wilko-we'll try to get them more involved especially in the on-boarding process.
    - Yvette-are they involved in new employee onboarding?
    - Claudia Wilko-yes, HR provides handbooks, rules.
    - Rachel Jiminez- Having this general information to get them started will be helpful, and we can refer them to TRS if they have questions beyond what the handout says. Great idea and thank you!
    - Shennel MaloneLedoux- I completely agree that HR should be more involved in understanding and explaining TRS.
    - Mickey Smith- HR does not handle any of our reporting. They do not tell the employees anything. They refer the employees to payroll.

RE Contact Types (Leslie Barron)

- Currently, RE Contacts listed as Web Administrator, Reporting Official, and Payroll Contact receive TRS email communication with important information related to updates, system outages, and training opportunities.
- We also include similar topics within our monthly Update Newsletters.
- Do you think we should expand the email recipients to include other RE Contact types or would the preference be for the Web Administrator to share the email

communication with the individuals that need to hear the information and are not the Reporting Official and Payroll Contact?

- If adding additional contact types, which ones?
- Lorinda Johnson-I would assume payroll, hr and web admin would be sent that information.
- Shenell MaloneLedoux- Agreed that it may need to go to multiple contacts. I (staff contact) complete the ED portion of the reporting and our Reporting Official completes the RP portion.
- Leslie Barron-thank you
- Claudia Wilko-clarification, reporting official has distribution, right?
    - Agree, and add HR.
    - Veronika Reyna is reporting official. There was a survey that was sent to all contacts. Can manager, reporting official, payroll, and HR receive this, not every single contact—staff members received the survey, and they didn't understand it. We have to explain who needs to do it. It was also sent to head of district and superintendent.
    - Jennifer Almanza-we expanded the group because the web admin, payroll, etc. listed aren't the only ones doing the reports. We want to give everyone reporting an opportunity to complete the survey. Generally, it's those contact types, but this isn't the case across the board.
    - Katie Tucker- The RE survey shouldn't have gone to head of institution, let us know if yours received it so we can correct this. We want to reach everyone our staff is interacting with. There may be a case that we receive multiple responses, and that's acceptable, but anyone who doesn't work with the reports should just answer "no"; we do want to capture that information.
    - Claudia Wilko-so, if we want to send more than one, 2-3 people working on reports, you don't need just one response?
    - Mark-yes, we have different contacts working different reports or parts of reports, and so we want to capture all reporting experiences. That's why we sent to everyone listed, and our goal is for the contacts to self-report that they are not interacting with reporting. We'd like as much input as we can receive.
    - Claudia Wilko-depending on set up, accessing the signature option, not everyone has that in the portal.
    - Mark- we can try to clarify that for next year. The surveys are helpful for us and lead to implementation of improvements. We

don't want anyone to miss out on the opportunity to provide feedback, but we're open to your ideas to help us better focus our participants.

- Jennifer Almanza- If you can have the web admin review RE web contacts, so that someone is listed, and this will help us include the HR contacts.

RE Training Plan and Feedback (Leslie Barron)

- Based on prior survey results, REs prefer to have more in-person training opportunities. Do you feel that this is still accurate?
- What type of session is easier for you to attend (virtual or in-person)?
  - Rachel Jimenez- enjoy flexibility of both.
  - Frances Whitaker-Virtual is great option.
  - Claudia Wilko-Agrees, virtual.
  - Shennel MaloneLedoux-I've taken advantage of both virtual and in person.
  - Theresa Zlotopolski-we are open to both virtual and live.
  - Frances Whitaker-I think in-person training is great for employees newer to reporting. In-person training is also valuable for networking and building connections with peers.
- Are there any training topics you would like for us to break down in more detail?
  - For example: Calculating Contributions and providing a detailed walk through.
  - Lorinda Johnson-clearing errors is a monster to new hires and new people, especially those going from sub to regular employees. The different software is not good at building records that TRS needs, especially for mid-month changes. Errors aren't corrected the same way each time. You're doing a good job addressing our pain-points, but that's the only other issue I can think of.
  - Jenn Almanz-so, creating scenarios for walking through different errors may be helpful?
  - Leslie-mini modules may be a solution.
  - Frances Whitaker- Question: Is there a way to post or clear prior-month penalty amounts (such as TRS-Care interest) before initiating the next month's TRS reporting process? For example, we had a $0.01 penalty from February and were unable to proceed with March reporting until a TexNet payment was processed. Has there been any consideration of establishing a minimum threshold for small balances?
    - (TRS) direct reply provided after meeting.
- For those RE contacts that have been doing TRS reporting for several years, are there any refresher topics or advanced training topics you would like TRS to offer?

- Lorinda Johnson- not a whole lot has changed for reporting piece, TIA maybe, as a veteran I don't use some resources anymore. I can't think of one that I need.
- Mark Chi-we want to give you timely training that you need.
- Shennel MaloneLedoux-I'm a new person, so that would be great to have as much support in training as possible, although I know veterans wouldn't want to sit through repeat training.
- Mark-thank you, we might need to differentiate/separate the trainings to help transitions and address different groups.
- Jennifer Almanza-virtual vs in-person, do you prefer one-on-one or big group sessions to meet your employer needs? Multiple in-person one on ones in an area with one main general?
- Shennel-both are needed, especially if goal is to include HR—to help them feel included and not dismiss "payroll" training.
- Jennifer Almanza-HR training can be helpful to let them know what to introduce.
- Lorinda-I like both, but a lot of the in-person becomes more of a workshop, while online is a training.
- Leslie-more engagement, all in one session.
- Mark-I'm curious, we have some of you in Austin and some outside of Austin area, think of your peers…how easy would it be for participants to commute here to Austin for a session? We do go out and are happy to meet you in your area, but how easy or acceptable would it be for employers to come to TRS in Austin for training?
- Lorinda- I'm not far from service centers, it would be easy enough for me to go to service centers, and I can speak for those in the area around us.
- Shennel MaloneLedoux-agree, service centers are better than driving to Austin.
- Mickey Smith-Service Center, Austin is too far
- Claudia Wilco-would love to visit the new buildings.

- Leslie Barron- time of year that works best?
    - Rachel Jimenez- If training is offered to the HR contacts, if you're looking for ideas, this time of year in particular, my HR department could benefit from training regarding the difference between temporary employment and part-time (as needed) employment.
        - Service Center would be our preference
    - Lorinda Johnson-for finance, February through May is golden.

- Frances Whitaker- agree, but, to include HR, early spring or late fall (Oct, Nov).
- Rachel Jimenez- Feb to April.
- Claudia Alba- HR prepares in April, May and June. Summer is busy due to actual hiring.

- Mark Chi is anyone here from HR?
  - Claudia Alba-I'm both because I'm at a service center. We appreciate refreshers, especially as we fill vacancies.
  - Mark- you may be able to help me. We've attempted training for HR staff in the past, our struggle is getting folks to understand the need to understand TRS laws and rules. We feel they handle more of the demographic piece. If that's not the case or if there's something else we can help with, we'd love that feedback. We're trying to help them connect the dots to why they need to be familiar with TRS.
  - Claudia-finance, they don't know when people have retired, status of employee, most districts include one person of HR, but they don't go on the website. I'm not sure if you should reach out to directors or head specialists, and for budgeting purposes, they're not able to ask questions to prevent surprises. HR should have training before hiring to know what to look for and how to go into the system.
  - Lorinda Johnson-HR doesn't realize they need this training, they might only go with finance.
  - Claudia- they assume finance can tell them everything.
  - Mark- we had some good responses, but it tapered off.
  - Claudia- have you tried a high-level HR Q&A?
  - Mark- good idea.
  - Claudia- during TASBO, they include some information about TRS. A high-level Q&A, but targeted to specific questions, would be helpful.
  - Mark- we recognize that you are answering a lot of the questions.
  - Theresa Zlotopolski- TRS manuals refer to payroll not HR. Same, all TRS questions are referred to payroll.
  - Mark-yes, maybe we need to rename our manuals, "HR manual".
  - Theresa Zlotopolski- Thank you, Mark.

- Claudia Wilko- Same here, HR relies on Payroll for everything.
- Claudia Alba- trying to separate duties between departments, it's about collaboration, HR & payroll need to collaborate together.
- Rachel Jiminez- Maybe you could provide short videos focused on topics like employment after retirement, TRS-eligible positions, and concurrent employment that we could share with our HR administrators/staff. These are all topics that are directly related to what they need to know when hiring employees. Maybe if they had this "teaser" they would be more interested in more opportunities for training.
- Mark- Rachel had a great idea about creating videos for HR staff. More education-focused?
- Rachel- yes.

- We are currently working on creating an annual RE training plan and expanding training opportunities to employers. Let's go over what we have created so far:
  - Every year we will offer 1:1 in-person training opportunities at the employer's location with a customized training plan based on their individual needs. These sessions would be offered throughout the calendar year and would be conducted by the assigned RE Coach.
  - Continue to conduct RE trainings virtually and at conferences.
  - **Legislative Years**
    - TRS will host in-person sessions at all 20 Education Service Centers to provide training information and updates related to TRS Reporting.
  - **Non-Legislative Years**
    - TRS will host in-person sessions at a smaller number of Education Service Centers to provide training information based on trends we have identified or employer feedback.
    - Offer TRS hosted training events at our location in Austin for employers to attend.
- For the TRS hosted events, is there a certain time of the year that you feel would be easier for RE contacts to travel to Austin and attend?
- Feedback on the overall proposed training plan?

- **From Tonya Davis, TASBO**
  - **I did want to see if we can talk about Stat Min calculations – I participate on the Payroll Mentoring group for TASBO, and we have several districts that are struggling with Stat Min calculations.**
    - **If TRS could provide some training on how to calculate, they are desperate for some help in this area.**
  - Jennifer Almanza – Tonya shared additional feedback on the specific areas employers are requesting additional Statutory Minimum calculation training.
    - Ex: adjustments that affect Stat Min calculation, dock in pay scenarios, mid-year fund type changes.
  - Based on this feedback we are currently working on creating a series of Statutory Minimum training sessions that will be available during our live virtual training sessions we conduct on Tuesdays and Thursdays. TASBO has also volunteered to host virtual sessions for their members. Overall, our goal is to continue to break down our training material to provide more in-depth information.
    - Jennifer Almanza-Leslie & I met with leads and consultants, we came up with a plan to create a series of trainings for Statutory Minimums, short sessions to break down Stat Min in depth, different scenarios with employees, to figure out compensation with the tables on the website, walking through from start to finish. One level at a time, specific to adjustments, doc in pay, and we're currently working on creating the materials.
      - Tonya says TASBO will love to host, and TRS would love to host trainings as well.
    - Lorinda Johnson-agree, Stat Min is a monster, and we're letting the system do too much and the system can be wrong. I like starting with "what is stat min", and I would attend even though I understand.
    - Claudia Alba- what do you do when something is incorrect? That guidance would be useful, learning what to do with these issues. I try to give guidance, but there's still confusion. We have a mentor group with TASBO, there are several districts with confusion. Simple questions need to be clarified. It can be clearer in the manual, especially for new people.
    - Claudia Wilko- add that the eligibility portion is vague, the calculation once it's set up with the tables, the system should do calculation for you, but sometimes the system doesn't do the right calculation, and we have to make corrections, but for the most part it does the job. Especially for new positions, created by the district, is it "stat min" eligible or not? Some are easy, but you can't

understand the more administrative positions through the manual. If it's up to the district, it's a vague very gray area.

- Claudia Alba- can we just have a manual for Stat min?
- Jennifer Almanza- we are looking at how we can improve the TRS reporting manual, breaking out into smaller topic-based manuals. Taking the examples and breaking them down into easier to understand parts.
- Frances Whitaker- It's subject to interpretation and everyone may interpret the manual differently
- Theresa Zlotopolski- HR classifies employees and HR determines stat min.

New RE Contact Training (Jenn)

- Jennifer Almanza- Do you prefer for your assigned RE coach to visit?
  - Shennel MaloneLedoux-now that coaches are switching off, I think it's more important that the same information is being repeated.
  - Claudia Wilko- same. No preference, but agree on consistent info.
  - Lorinda Johnson- no preference.
  - Frances Whitaker- no preference.
  - Kamray Runnels- we did not have our coach come to the session. Two TRS representatives came, and we still enjoyed the presentation and the conversations we had.
- As part of the proposed annual RE training plan, what training topics do you think new RE contacts would find valuable?
  - Ex: RE Portal Training
- Would it be easier for them to attend in-person sessions or virtual? What format do you think would be more beneficial?
- How often do you think TRS should host these sessions?
- How long do you think a new RE contact would need to attend training for?
  - Lorinda Johnson-you mean for new contacts?
  - Jennifer Almanza-Yes, we'd like to provide formal training, RE portal and cover TRS Laws & Rules. How often should these be provided throughout the year, and how many days of training should be allotted, what would be sufficient for a new employee to obtain info?
  - Frances Whitaker-Do you have the ability to do TEAMS virtual trainings? Sharing screens is super helpful if anyone is not available to go in person.
  - Jennifer Almanza- do ESCs have similar lab set ups so we can do training?

- Katie Tucker-does your district have access to laptop training?
- Theresa Zlotopolski- not sure, but we have our own laptops
- Rachel Jimenez- I do not know about our ESC, but we do have laptops.
- Claudia Wilko- we do have access to computers for training at our district's locations. For training new REs, at least twice a year or every quarter.
- Lorinda- no more than twice a year, no more than a day at a time…just that it can be overwhelming and take us away too long.
- Shennel MaloneLedoux- agree with Lorinda. It may be more important to come back and revisit over time. There should be follow-up trainings for new people to see where they are.
- Claudia Wilko- for new REs, at least twice a year, or every quarter. Just a one day or half day session. There are different needs throughout a full year cycle. We need help, but throughout the year to address all the specific things that come up at different parts of the year.
- Theresa Zlotopolski- 2 days of live trainings, then the support during the first few months.

Semester Dates (Jennifer Almanza)

- REs have the functionality to enter their semester dates within the RE Portal once their academic calendar has been approved for the school year. We would like to communicate this information to employers through emails, update newsletters, and coach outreach.
- Once the RE has entered the information, they would need to upload their approved academic calendar through the RE Document Upload site as a verification process.
    - Any thoughts on this idea?
    - Lorinda Johnson-I don't think it would be a problem. Clarification?
    - Jennifer Almanza- upload through site, RE portal.
    - Lorinda- would have to get information out.
- What types of resources do you think employers need?
- Have you experienced any issues or errors when trying to submit semester dates?
    - Lorinda Johnson- not that I know of.
    - Claudia Alba-I haven't entered semester dates for entities.
    - Frances Whitaker-same

- Jennifer Almanza-figure out what steps we can take, many folks aren't entering that data.
- Mark Chi- we hope through this push that this information can get into our system a lot faster. We don't want to wait for your employees to retire, before our processors to have to then find the semester dates. If you can help us facilitate that, the info will get into our system a lot sooner.
- Jennifer Almanza-any other resource ideas?
    - Claudia Alba-the notifications that the portal will be down, but some expire and are removed…let us know what is coming up so we can plan around upcoming times the portal will be down.
- Theresa Zlotopolski- We have to ask our coach to enter our calendar.
- Katie Tucker- Theresa, is that because dates are already on the portal and need to be updated? or you receive an error when entering semester dates for a new year?
- Theresa Zlotopolski- Yes, but we are year round and are having to provide our calendar

- **Questions**
    - Lorinda Johnson- errors in portal, you have to exit and go back in. I was helping Georgetown ISD, and it happened so much with them. I don't know what causes the error, it hasn't been reported.
        - Jennifer Almanza-there are two types of common causes for the errors: 1) from a radio button. 2) causes a full log out, if you have the portal saved as a favorite, and clearing cache might be issue/solution.
        - Nathan Farmer- Yes, saving as a favorite may cause issues. Lori, for Georgetown, if they have multiple screens open under the same browser, that may cause an error. If you need to see two windows, you may need to open them in different browser types.
        - Lorinda Johnson- I am familiar with that. I don't know Georgetown's exact set up, I know it happens with me. I didn't know what was causing it.
        - Brandi Gardner- also, be sure to use the RE Portal in Chrome, Edge may cause issues. With Chrome, you must make sure you have the most current version, or you will experience display lags and synchronization errors.
    - Claudia Alba-Is TRS still shuffling coaches? I requested something, and I never got a response, and I don't know if it's because she switched.
        - Jennifer Almanza-the plan is that you will stay with your coach for the next four years, and shuffle will be every 4 years. However, you may have been placed with a temporary coach while a coach was on leave. Also, our new hires are assigned after

completing training. Let us know if you don't get a response. Email Reporting@trs.texas.gov .

- Claudia Alba-you can't see what you sent in secure emails. It would be good if we can see what we've sent to you.
    - Frances Whitaker- yes!!! Especially when they want to know what was sent in a prior email
- Jennifer Almanza-yes, we can look to see what options we have. May be a Microsoft issue.
- Claudia Alba- if I send info to your secure system, will the email bounce back?
- Jennifer Almanza- we must create an account, but it would be the same.
- Jennifer Almanza -any other questions?
- Mark-thank you for great feedback.
- Lorinda Johnson- Thank you for giving us the opportunity to make this whole process even better!
- Claudia Wilko- Thank you!
- Jennifer Almanza-sharing Leslie and my email in the chat. We're always excited to hear feedback. We use it to create new training materials. Please send information you'd like to share to our emails:
    - Leslie.Barron@trs.texas.gov; Jennifer.Almanza@trs.texas.gov
- Mark-Lorinda, can you send images of the posters you like that you mentioned to Yvette?
- Lorinda Johnson- yes.

Meeting concluded at 2:54PM