Employer Advisory Group Meeting Agenda & Minutes

Date: 06/30/2025
Start Time: 2:00 PM
End Time: 4:00 PM
Location: Microsoft Teams

Type of meeting: Quarterly Meeting
Meeting called by: ***David Green***
Minutes by: David Green
Invitees: ~~Barbie Pearson~~, *Mark Chi*, *Katie Tucker*, ~~Ashley Conrad~~, *Brandi Gardner* *Nathan Farmer*, ~~Jennifer Almanza~~, ~~Catarina Saucedo~~, *Meera Merrill,* ~~Nicholas Gonzalez~~, ~~Kevin Wakley~~, *Leslie Barron*, ~~Chris Cutler, Erica Villarreal~~, ~~Jennifer Gasior~~, *Megan Van Winkle*

Higher & Non-Higher Education EAG Members and designated participants:

Amanda Babcock	University of TX		***Kathy Rice***	Midwestern State	
~~**Annel Perez**~~	South TX College		***Kay Johnson***	Stephen F Austin	
~~**Ashly Hester**~~	UT at Austin		~~**Kendall Rocha**~~	Stephen F Austin	
Betty Butler	Dallas Community		~~**Kim Ray**~~	UTMB Galveston	
~~**Brittany Heim Sgarlat**~~	San Jacinto College		***Lori Johnson***	Hutto ISD	
~~**Carla Gonzalez**~~	Pflugerville ISD		~~**Lynn Nicholson**~~	Mason ISD	
Christine Okanla	ACC		~~**Mary Ramon**~~	Northside ISD	
~~**Christine Porter**~~	Spring Branch ISD		~~**Mickey Smith**~~	Crandall ISD	
Claudia Alba	ESC 12		***Misty Sanders***	Texas Tech	
Claudia Wilko	Northside ISD		***Rachel Jimenez***	Conroe ISD	
Eric Kennedy	ACC		~~**RL Richards**~~	Muleshoe ISD	
~~**Fran Whitaker**~~	Judson ISD		~~**Sherry McGraw**~~	Sulphur Springs ISD	
~~**Ginger Gamble**~~	North East ISD		~~**Tammy Cunningham**~~	ESC Region 8	
~~**Jeffrey Coats**~~	North East ISD		***Tera Harris***	Spring Branch ISD	
~~**Judy Como**~~	Judson ISD		~~**Theresa Zlotopolski**~~	Clint ISD	
Karen McDade	TX A&M		~~**Tiffany Yarbrough**~~	Sulphur Springs ISD	
~~**Kathy Henderson**~~	Aransas County ISD		***Tonya Davis***	TASBO	

Other Attendees not listed: *Dena Carlson, San Jacinto College*; *Laci Cramer, Texas Tech*; *Kristi Kolaja-Jaggers, UTMB*;

Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent REs from all over the State and all types of employers. They serve as the collective “voice” of all REs.

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.

Please…

✓ *Mute your speaker to avoid sharing background noise*

✓ *Do not put this call on hold*

AGENDA

- **Questions / topics from EAG members**
  - Katie—no questions received in advance of the meeting.
- **Information from TRS :**
  - Survey EAG members to get thoughts on topic-based training ideas
    - *Are there any topics you recommend that we can use to expand our current training topics?*
    - *(posted in chat:)*
      - *Current Virtual Training Topics*
        - *Substitute Employment*
        - *TRS Membership Eligibility: Higher Education & Non-HE*
        - *Reporting ORP*
        - *Statutory Minimum*
        - *Employment After Retirement: Higher Education & Non-HE*
        - *View Employee Information*
        - *TRS Reporting Requirements*
        - *Verify Membership Eligibility*
        - *RE Certifications*
        - *Employer Contributions: Higher Education & Non-HE*
        - *Creditable Compensation*
        - *RE Ledger*
        - *Reconciling RE Ledger*
        - *Reporting Summer School*
      - *Current Web Based/eLearning*
        - *Retirement Certification*
        - *Reporting Tips - Substitutes*
        - (end of topics posted in chat)
    - *Are there any training topics/ideas that would better support RE contacts that have*

more experience with TRS reporting?

- *Katie-some topics cover both classes of employers, and there are also specified training topics by group.*
- *Tonya Davis- TASBO—**new hire reporting? In summer when coaches move from district to district, temporary vs contract.** Potential Topic covering temporary employment from old district to new district, when employees are brought on for summer camps.*
  - *From Mark's Notes:*
    - *Tonya Davis - Consideration when RE hire someone in-between contracts, are listing this person as temporary while working summer camps*
      - *Can consider including this scenario as part of summer school reporting training*
  - *Katie-are they defining the "temporary" to a certain period?*
  - *Tonya- typically it's for a summer camp, 2 weeks, or different sports, football, etc. Before the official start date for district.*
    - *They're hired as temporary employees eligible for TRS contributions.*
    - *Can't be paid through payroll on that new contract.*
  - *Katie-maybe something we can consider adding for summertime employment.*
  - *Tonya-it could be work time for new hire prior to start date, depending on coach's calendar vs teacher's calendar.*
  - *Katie-reporting summer school is a new topic added this year but materials focusing on reporting summer school. This could be added to the summer school or a new training for early may or late June could be helpful.*
  - *(in chat) Rachel Jimenez--I would be happy to fill out a survey so I can take the time to give this some thought and consult with others with our District who work with TRS reporting.*
  - *Katie- send your suggestions to your assigned coach so we can consider your requests. We'll share brief responses to your suggestions and ideas.*
- *Katie- we're in the process of recording training courses so that those who can't attend live sessions can receive information. In the upcoming year we hope to share the recordings with EAGs.*
- *From Mark's Notes:*
- *Will send out survey to EAG members first for feedback (Rachel Jiminez and Claudia Wilko)*

- Concurrent Employment Report:
  - Preference of updating validation 578 to trigger the error up front rather than after the fact. Warning Message "This employee is being reported by another RE as being in a TRS-eligible position. TRS Membership Eligibility Flag must be Y. If you feel the reported information related to this error is correct, please contact TRS."
  - *Help them better understand the warning and how to work it?*
  - *Automated email from the RE Portal with a list of possibly impacted employees?*
  - *Coaches review and contact the RE to let them know it may be an issue down the road?*
  - *Feedback: What would help your school in scenarios with concurrent employment?*
    - *Claudia Wilko=Auto email.*
      - *Rachel Jimenez agrees.*
    - *From chat:*
      - *Rachel Jimenez- Would this also be able to notify us when the concurrent employment ends?*
      - *Katie-this is something we could consider*
      - *Kristi Kolaja-Jaggers-I would like training, in conjunction with the automated email*
      - *Dena Carlson- Training on Concurrent Employment*
      - *Misty Sanders- Automated email and I agree with Rachel if we can get another email when it ends.*
    - *Betty Butler- will the 2nd RE be required to go back and adjust payroll?*
      - *Katie-yes, you're required to go back and correct those prior months if the employee is still employed with you and receiving pay.*
        - *If the employee has terminated all employment and has no additional compensation due to them you may not be able to do those corrections, so I can see this as one challenge with concurrent employment.*
        - *We will capture your preferences and consider next steps.*
  - *Mark's Notes: A few options – change error to warning; provide training specific to this process; email to RE for potential impacted members; notification on coach side so coach can confirm with RE on membership eligibility.*
  - *Some prefer automated email; others prefer training.*
    - *Betty Butler – if second RE with contribution posts, and then first posts, will the first need to make adjustments? Experienced two payroll ahead before the first RE completes the report.*
    - *Katie – goal is to reduce this amount of time between the REs posting their reports.*

- *Rachel – would like to see an email when the concurrent employment ends as well.*

- Discuss importance of submitting ED90s
  - *ED90 records close the open employment relation between the participant and an RE on our system that was created with the submission of ED20 and ED40 records.*
  - *Not submitting ED90 records when an employee has terminated all employment, or has not foreseeable future work agreement, can cause delays in TRS issuing benefits to our members.*
  - *TRS has considered the possibility of completing a data cleanup project that would close open employments on our system if there haven't been positions for the current and one year prior.*
  - ***Are there concerns or complications that you can think of if we decide to move forward with the project?***
    - *If the employee were to return to work for your RE in the future, you would need to submit an ED20 and ED40 for the employee. Rather than just an ED40.*
    - *Claudia Wilko-What would the criteria be, how often clean up?*
    - *Katie-frequency not yet discussed. There may be just an initial data clean-up project, and maybe afterwards this would be repeated on an annual basis.*
    - *Claudia- so maybe every year?*
    - *Katie-tentatively-if, for example, we didn't see any contract and RE transactions for FY25 or FY24, and the last transaction was in FY23, we would then use the current year project to address that employment. We'd look at roughly 2 years of not seeing any transaction records.*
    - *Claudia- and those within the same year?*
    - *Katie, yes, we would leave it open if we received contract and/or RP transactions within the last 2 years.*
    - *Christine Okanla-when will the employment be closed?*
    - *Katie-we'd use last reported RE transaction to determine the termination date.*
    - *Claudia Alba-I remember viewing old certifications. Thanks. This is a great idea.*
    - *Katie-the implementation of the retirement and death certifications brought this to our attention. We want to make sure we can consider doing something on our side for the older employments rather than requiring the schools research and post ED90 records.*
    - *Claudia Alba-we currently have to contact the coaches and let them know of old terminations, it will reduce emails for coaches as well.*
      - *Betty Butler- I agree with Claudia.*
    - *Katie-It appears with those participating today, there's comfort with moving forward with continuing our internal conversations related to implementing this approach.*

  - *Mark's Notes: Claudia Wilko – How often would TRS be doing this? What would be the requirements?*
  - *Katie – if we didn't see any contracts or position records, and RP transactions for FY2025, or FY2024; last transaction was in FY2023, then close the employment/position.*
  - *Christine Okanla – When will the employment be closed*
  - *Katie – Based on last RP transaction*
  - *Claudia Alba – Will benefit a lot of districts because I remember receiving old retirement certifications, so I think it will be a good idea. Also, might help the coaches since we had to reach out to them and either ask for clarification or update them on information.*
  - *EAG members think this is a good approach*
- Re-Assigning RE when Coach leaves
  - *Turnover has been lower for the coaches in recent years, but we want to make sure when it happens, REs are feeling supported.*
  - *Preference to stay with Reporting@trs.texas.gov so that the first available Coach can assist OR temporarily being assigned to a different RE Coach until we fill the position and begin training?*
    - *Katie-what would make you feel supported the best?*
    - *Dena-temporary assignment to another coach.*
      - *Agree: Claudia Alba, Rachel, Kristi, Claudia Wilko, Christine Okanla.*
    - *Katie-overwhelming response to temp coach.*
    - *Mark's Note: Dena Carlson – temporary assignment to a temp coach is preferred*
      - *EAG members agree temporary assignment is preferred*
- Resources
  - *What other resources would be helpful for us to develop, improve, or expand upon to better assist REs with TRS Reporting?*
    - *Mark, adding-which resources are already helpful to you, and what makes it helpful compared to others?*
    - *Claudia Alba-service center employee, looking at website, I shared trainings from past, it would be good to have a library. I did not see a lot of resources for new to TRS employee.*
      - *Katie, that's really helpful.*
      - *Mark's Note: Claudia Alba – had a new employee at the ESC and it was a little limited on what he can learn. Would be good to have a library for new employees to use. I couldn't see a lot of resources for him, being new to TRS.*
  - *Recently we updated the TRS website and created a Member Education Resources page for REs. (posted to chat)*
    - *This page includes Life and Job Changes, formerly known as the Employer Toolkit.*
      - *Does anyone use the Life and Job Changes page to provide information to your employee?*

        - *If not, what may prevent you from using the resource?*
        - *Katie- For new employees, you could request our counselors to come out to a new hire orientation presentation.*
        - *Claudia Alba-I love that we can ask for this resource for our new hires, and it would be great for people retiring, we sometimes have maybe 20-30 retiring at a time, and they often seek help from the payroll office.*
        - *Katie- you can request this type of training through the form, in the additional information section, you can fill in what you're looking for.*
        - *Mark-we do one on one member office visits, and we also do group office visits, for example during Spring Break. Employees can sign up for a group office visit with a counselor. Would this be helpful?*
        - *C. Alba-yes, they have questions about forms. It would be amazing.*
        - *Mark-we've created pilots for opportunities like this outside of Austin. Maybe we can use this form and update it so we can collect when the requests are for new employees or retiring employees, so we can get a sense of the number and prepare.*
        - *Mark's Notes: Claudia Alba – would like when you have a large number of employees who are retiring, it would be great if the REs can have a group office visit. Mark will talk to Yvette.*

- ESC Workshop reminder (**Leslie**)
    - *We begin travelling to all 20 Region Service Centers on July 28, 2025 for our in-person training sessions. The full schedule is available on the website, and we still have some available seats for attendance.*
    - *If you have not already registered to attend, please be sure to register as soon as possible to ensure a seat as some locations have limited seating.*
        - *Link shared in chat.*
        - *https://www.trs.texas.gov/employers/employer-portal/training/in-person-workshops*
    - *In addition to reporting refreshers, the sessions will include an update on the recent legislation, House Bill 2, will not have major impacts on the monthly reporting process.*
        - *Surcharges*
            - *Due to the passage of HB2, employers may now pass the cost of the EAR surcharge onto the employee. Previously, employers were prohibited from passing on this cost to the employee.*
            - *This is a matter that is handled between the member and the employer. TRS is not involved in who should pay the surcharge except from making sure that it is remitted to TRS.*
            - *This change is effective immediately.*
        - *Teacher Retention Allotment (TRA) and Support Staff Retention Allotment*

- *HB2 introduces two new allotments to provide pay increases to classroom teachers and other support staff: the teacher retention allotment and support staff retention allotment. HB 2 further provides that any increased compensation paid to teachers or support staff employed by a TRS-covered employer with funds from these allotments qualifies as creditable compensation for TRS purposes.*
    - *Clarification on HB 2 related to years of experience*
        - *TRS has received some questions related to the requirement within HB2 for years of experience.*
        - *As a reminder, TRS members can earn a Year of Service by working 90 or more days in a TRS membership eligible within the fiscal year.*
        - *The YOS a member earns and maintains with TRS can be different from the Years of Experience on their service records with TEA.*
        - *We recommend that REs contact TEA related to the YOE requirement within HB2.*
        - *Questions?*
            - *None asked.*
- *Plan for EAG meeting frequency (Katie)*
    - *After feedback from our EAG members and leadership here at TRS, we are establishing a new frequency for the EAG Meetings.*
    - *We will be holding 1 EAG meeting per quarter starting with the upcoming fiscal year.*
        - *Quarter 1 and 4 will be a combined meeting like we are having today.*
        - *The other two quarters will be one meeting with just Higher Education members and the other will be a meeting with just the non-higher education members.*
    - *While this will be the set schedule, if something comes up we may schedule an ad hoc meeting as needed.*
- Year-end information
    - *Year End deadlines*
        - *All FY 2025 contributions, interest, and fee balances <u>must</u> be paid in full with the completion of the August 2025 Report Period. Any unpaid FY 2025 balances may be subject to collection by TRS, which can include a demand letter to the head of institution. Please review the balances after <u>each</u> report period completes and bring balances to a $0 balance.*
        - *All FY 2025 Reports, Regular Payroll and Employment After Retirement, <u>must</u> complete by **Sept. 19, 2025** for year end processing. This is also the penalty fee grace period deadline for both August 2025 Reports (RP & ER). Not completing the reports by this deadline can cause TRS membership eligible employees to have an inaccurate annual statement. As a reminder, TRS does not reissue corrected annual member statements. Any questions about inaccurate annual salary amounts may be directed to your RE.*
- *GASB schedules*

  - *The Governmental Accounting Standards Board (GASB) schedules and supporting information for the measurement year ended Aug. 31, 2024, are now posted on the TRS website for Reporting Employers. REs should use these to prepare fiscal year 2025 financial statements. For additional information, please visit GASB Statements on the TRS website.*
  - *(link shared in chat)*
- *Grace Period*
  - *The Grace Period established effective with the Sept. 2024 reporting period will remain the same for the upcoming 2025-2026 fiscal year.*
  - *The Penalty Fee Grace Period the September 2025 payroll reports will remain 21 days. While all subsequent report months, October 2025-August 2026, will fall under the 14 calendar day grace period for report completion. We will update the Penalty Fee page of the website closer to the new fiscal year with all the due dates and penalty fee deadlines.*
- *TRS website update*
  - *TRS launched the new website design on **April 16, 2025.** The new website provided an opportunity for us to revisit how the resources for REs are organized and an opportunity to evaluate what resources we currently offer.*
  - *If you've had an opportunity to visit the new website, do you have any recommendations or feedback for the employer's portion?*
    - *Link posted in chat, for employers' section.*
    - *Mark-we're still in process of updating prior issues of "updates". We're working with Communications to make sure the information is still accessible. We want to enhance and identify the information that's most useful.*
    - *Mark-we may try to send a few surveys out to you before the rest of the RE's. We want to be sure what we're asking makes sense and improve the surveys before sharing with a wider group.*
      - *Rachel Jimenes- that works for me.*
- *As part of a pension plan study, TRS plans to survey employers about Social Security. Here are some sample questions:*
    - *As an employer, do you contribute to Social Security for any of your TRS-eligible employees?*
      - *Amanda Babcock- UT does for everyone.*
    - *Do you contribute to Social Security for all of your TRS-eligible employees?*
    - *For what TRS-eligible employees do you contribute to Social Security for?*
      - *Position Code 01: Professional/Administration*
      - *Position Code 02: Teachers/Full-Time Librarians*
      - *Position Code 03: Support Staff-Other*
      - *Position Code 04: Bus Driver*
      - *Position Code 05: Full-time Nurse/Counselor*

- *Position Code 06: Peace Officer*
- *Position Code 07: Support Staff-Food Service Worker*

- **Questions**
  - Claudia Wilko- **related to information received by employees when they call the TRS#, to ask questions, share complaints, request service years, etc.** We notice inconsistency regarding information they receive. Retirement advisors, consultants, when know they are a different department from Benefit Accounting. Many times they're not hearing the same information as what we tell them we have received from TRS and the RE's. We've had a few cases like this, which adds to the back and forth, and the member can't talk to our coach, and they say "TRS told me something else", and they often will talk to different counselors when they call. ***Can you reach out to other departments to keep the information consistent?*** Years of service, for example. One employee resigned, and they were close but didn't get 90 days of service, but they're told their employer can fix it through a form. How can this be addressed internally within TRS?
    - Another example: a substitute wants to go back 20 years to get credit, and customer Service says give a form to your district, and we have to take a lot of time to go back to research, only to deny them once we find the discrepancy.
    - Mark-that's very helpful. When you encounter these discrepancies can you send us the member name? Our member calls are recorded, and we can do a review of the calls to verify the shared information. There is a Quality Assurance process within that department. Share the employee information with us, including the last 4 of the social, so we can check the information and establish training opportunities.
    - Claudia-we can share this information with our coach?
    - Mark-yes. We ultimately want to share this feedback with their managers. We want to be sure the members receive consistent information and are not filling out unnecessary forms. We can share with Coaches and Counselors.
    - Claudia- we have cases where we share statements from the employee with our coach to confirm, and, after checking with coach, we go back to employee and say everything is correct, but the member still doesn't agree. Who can we refer the member to, in TRS, if they're not happy with the result?
    - Mark-the member would still need to chat with our counselor, but I can confirm what our counseling leadership would like to do in these cases. They may have a different process. If ok with this group, **we will reach out to the counseling department, and follow up.**
      - Kristy Kojala-Jaggers Agreed with Claudia- we've had this same thing happen. They're expecting us to make corrections to records from the 90s because that's what they were told by TRS.

- Rachel Jimenez- Our biggest struggle right now is retiring employees reaching out to us stating that TRS has notified them that they are waiting for us to complete their certification. We cannot complete the certification until the final check is paid. In some cases, we cannot even see the certification because their last day has not even passed.

- Mark-when this happens, again, let us know and we can look for coaching opportunities here. You're right, we should be letting members know that certification won't be completed until everything is done.

- Mark's Notes: Claudia Wilko – Question related to information members receive. When members call about their questions, years of service, when they retire, there appear to be some inconsistencies from the counselors. Information is different from what the employer is providing us. One example could be something that they need to fix related to years of service, they resigned prior to earning 90 days of service. Member told employer just needs to submit the form (22I). Another example of substitute who worked 20 years but counselor says to still complete a 22S. Why does rep still tell the member to complete the 22s?

- Rachel Jiminez - Our biggest struggle right now is retiring employees reaching out to us stating that TRS has notified them that they are waiting for us to complete their certification. We cannot complete the certification until the final check is paid. In some cases, we cannot even see the certification because their last day has not even passed.

- **Dena Carlson- enhancement to portal for year of service, is that something we can add?** It's obvious they've earned as of June, but if they are concurrent, I can't tell if they've earned a year of service. It's difficult to determine if they've earned a year of service. We got a warning that surprised us because we thought we calculated a year of service, and our coach confirmed it, and the system wasn't adding them up correctly. We have the records, maybe it's along the concurrent conversation, it's when they're working at other entities, we're trying to get it correct.

  - Mark, yes the concurrent is a challenge. We're looking at making improvements related to view employee information screen. No good solution at this time, but we are looking at ways to address this, and we are open to any suggestions or ideas you have as you go through the reporting process as well.

  - Dena-thank you, and our coach is helpful and responsive to these challenges.

  - Mark-yes, that is our focus, that our coaches are responsive to these unique situations.

  - Mark's Notes: Dena Carlson – Suggestion related to year of service. In June, the member earned a year of service, but related to concurrent service, it's challenging. Getting ready to pay June, reviewing the portal to see whether year of service is earned because the person may have a non-standard work week. It'll be helpful to know when someone earns a year of service, specifically for someone who is concurrent and working a non-standard.

- Mark- any other questions?
- [No further questions.]
- Mark- we will clean up our notes and share surveys soon. We're seeking ideas and manageable and practical solutions we can provide. As Katie mentioned, we have the goal of recording our training so information is more conveniently accessible.