



Employer Advisory Group Meeting Agenda

Date: 10/23/2025
Start Time: 1:30 PM
End Time: 3:30 PM
Location: Microsoft Teams

Type of meeting: Quarterly Meeting
Meeting called by: David Green
Minutes by: David Green
Invitees:

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

Additional Invitees: Addison Reagan, Deanna DeGraw, Elizabeth Hallmark, Jennifer Moen, Lori LaBrie

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

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

Other Attendees not listed: Laci Cramer (TTU); Bianca Cochran (ESC 8);

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*.

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Please...

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

AGENDA

- Questions / topics from EAG members

- 🕒 None received

- Information from TRS :

- 🕒 "A Preview of Helpful Resources to Share with TRS Members"- Lori LaBrie -guest presentation. (30 minutes)

- Topic: Requesting feedback on presentation

- Will share presentation deck with the EAG members.

- First session for this training is scheduled for next Wednesday (10/29/25).

- Lori LaBrie—Our objective is to equip EAGs with tools to help new hires navigate TRS website.

- At top of website, Learning and Resource guide.

- We're accepting questions in chat, but your RE coach is best contact.

- Learning tabs provides FAQ's. QR link in slide deck.

- Learning Resources page

- Event Calendar

- Video Library

- Publications

- Life & Job Changes

- Pension Benefits. QR link in slide deck

- Resources for planning retirement, retirees, forms, calculator, beneficiary resources, and more.

- Active Member Resources

- New Member Quick Start Guide

- Calculators

- Health Benefits. QR link in slide deck.

- MyTRS Portal. QR link in slide deck.

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- *TRS Member Center. QR link in slide deck.*
 - *Appointments with counselors available through MyTRS.*
- *Social Media Channels.*
- *TRS Ombuds office information: available to assist members for issues beyond Member Services.*
- *Questions? Contact Us! QR link in slide deck. REs can reach out to Coach.*
- *Questions related to “Helpful Resources to Share with TRS Members” presentation:*
 - *Mark- Every quarter we will provide this training to our employers.*
 - *Feedback on the presentation:*
 - *Lori (Hutto)- to help with encouraging updates for address, is it acceptable to put a link to MyTRS on our pages for our employees?*
 - *Mark, yes this would be helpful, we want to provide as much information as possible to our employees.*
 - *Brittany Sgarlat-Is something similar to a website walkthrough available for members?*
 - *Beth Hallmark (chief communication officer)-we did a re-design of the website this year, and we did a walkthrough for where to find some interactive features. We could do a website 101, a “get started” for our website. That’d be a good value add.*
 - *Mark-shared New Member Quick Start Guide link: <https://www.trs.texas.gov/pension-benefits/active-member-resources/quick-start-guide>*
 - *Brittany- yes, we plan to include the quick start guide. We’re interested in an actual video. The re-design overwhelmed some. We wanted a guide that was more focused on encouraging our employees to set up their MyTRS login. Thank you.*
 - *Mark-we recently created a member video. Related to those resources, which might help as well, Brittany: <https://www.youtube.com/watch?v=NC9R9fKgtQs>*
 - *Beth- We have a short welcome to TRS video, as well. Designed to be short for introduction.*
 - *Brittany- Thank you.*

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- Mark-if you think of anything else, please complete the survey shared in the chat, we will also share this survey in future presentations of this topic.

- Survey link provided in chat:

○ https://trstx.gov1.qualtrics.com/jfe/form/SV_3Ohq41KzxAvaslw

🕒 RE document upload process (Jenn)

- We are happy to share that the RE document upload site launched on Monday September 29. This new feature allows Reporting Employers to securely upload employer related documents directly to their TRS Coach.
- This enhancement was driven by your feedback and we're thrilled to deliver a solution that makes the process easier and more secure.
- If you have been able to utilize this new feature, we would like to gather some feedback.
 - What has your experience been so far?
 - Lori- (Hutto) Haven't tried site because I understood you can only upload each member individually, per the email received 10/22/2025.
 - Jenn—the email yesterday was related to two documents (SSA1945 and TRS28) that will route you to upload to that site. This is for the RE portal, upload specific to reporting process. Two different features.
 - Katie- SSA1945 and TRS28s...we are accepting those forms. Add your contact information, and the ssn field, even as an employer, up to 50 documents are allowed at a time.
 - Brittany Sgarlart- for RE upload, will this replace the list of overrides, or will we still send that through email? In the email, we include a backup spreadsheet with all the requirements.
 - Jenn-depending on doc type, once the document is uploaded it goes in employer account. There are limitations based on type. You can convert spreadsheets and upload them directly through the site, but responses will not include the spreadsheet in an excel format.
 - Mark-we recommend continuing using email due to audits, as email makes information easier to find. We will update you all if there are changes.
 - Mary Ramon-SSA1945, Can I ask what is done with the SSA1945 form? Does that get uploaded to each member's account and is a reconciliation ever done if we missed one?
 - Jenn-yes, it goes to imaging team, and then is added to the member's account.
 - Re: reconciliations for missed documents?

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- *Mark-no, we do not reconcile to my knowledge.*

🕒 Annual Member Statements

- *Annual member statements have been completed and members have access to this information through their MyTRS account.*
- *If the member has their MyTRS account set up, they will not receive copy in mail but will receive an email once the statement is ready to view.*
 - *As a reminder, annual statements are based on compensation that was paid and reported from September 1st through August 31st.*
- *(Katie to confirm if mailed out) Goal date of end of November*

🕒 E-Learning & Recorded Training Initiatives

- *As we continue to build our TRS Reporting training and resources, we wanted to share an update on our new e-learning modules and recorded trainings that are currently available on the website.*
- *E-Learnings are short interactive self-paced modules on a specific topic. Each course is divided into short, focused lessons with built-in knowledge checks to reinforce learning.*
 - *Available on the website now*
 - [Reporting Tips - Substitutes](#)
- *Our team is currently working on creating e-learnings on the following topics*
 - *Adjunct Eligibility*
 - *Non Standard Work Week*
 - *Adjunct – Employment After Retirement*
 - *Error Resolution*
 - *These e-learnings will be broken down based on record type warnings and errors.*
 - *We are also continuing to work on recording our virtual RE topic based trainings that we present live on Tuesdays and Thursdays. These recordings will be based on the information that we share during those live sessions, and you will have access to the presentation along with the script on the website.*
 - *Available on the website now*
 - [Retirement Certification Training](#)
- *We are currently working on creating recorded trainings on the following topics that should be available on the TRS website in Spring 2026.*
 - *TRS Membership Eligibility- Higher Education and Non-Higher Education*

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- *Employment After Retirement – Higher Education and Non-Higher Education*
- *Creditable Compensation*
- *Reporting ORP*
- *Any questions? Regarding training initiatives?*
 - *None asked.*

🕒 *Member Resources Video*

- *The member education resources page, formally known as the employer toolkit is a helpful resource you can guide your employees to when they have questions related to their TRS benefits.*
- *The video can be located on the TRS website under Reporting Employer Training and I have included a link below.*
 - [Member Education Resources](#)

🕒 *EAG Feedback on Resources*

- We would like to thank everyone that completed the TRS Employer Reporting Resource survey and discuss some of the common feedback we received.
 - Many survey results included more Webinars and videos (as mentioned earlier, this is something that we are already working on)
 - Better error resolution
 - We are currently working on creating a error resolution virtual training series based on record/report type and the common warnings and errors employers see.
 - Our first error resolution training is scheduled Thursday December 11th and will focus on common warnings and errors related to RP reports.
 - Spring 2026, we plan to introduce the second training in this series that will focus on ED common warnings and errors.
 - Our goal is to continue expanding this series to also include other common errors related to verify membership eligibility, statutory minimum when dock days are involved, and how to actively work warnings before they trigger an error.
 - **Mark shared link:** <https://www.trs.texas.gov/employers/training-and-resources/training/virtual-training>

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- Question from Mary Ramon: *On the topic of warnings and error resolution did anything change with regards to the warnings for the RP? We had an override for an employee working too many hours for the month of September but did not have any warnings for that employee in the July and Aug reports.*
 - Jenn-Nothing has changed on our end regarding validations. Mary, please email that issue to me, and we can investigate.
 - Mary-I can do that.
 - Mark-it will trigger an error depending on eligibility for hours worked, but once we review it, we can assist.
- The main topics of interest we received feedback on for additional resources were
 - Stat Min Eligibility
 - Error Resolution
- Improvements to Payroll Manuals
 - Stat Min Guidelines - specific information related to who the state minimum salaries apply to
 - Update Newsletter search
 - We are in the beginning stages of creating a searchable feature on the TRS website that will allow employers to search key words to locate specific Update Newsletter articles that contain information related to the topic.
- Dislikes of current resources
 - Hard to locate - this was a common response throughout the survey. Website was hard to navigate and locating information or resources was difficult on the website. Information or resources were in several different areas, not organized.
 - Information provided within the resources are not always clear enough to determine an answer.
 - Jenn-we're taking to time to look at where we house our materials and improve searchability. Payroll manual is one big area we're focusing on. Error Resolution guide, virtual sessions, recording training.
 - Jenn-Thank you for sharing feedback, it provides a great starting point.
 - Mary Ramon- *Is there any chart or guidance on how many days TRS considers a workable day that we can reference to help our departments manage their employees' hours to not receive warnings. Are we just suppose to use the agency holidays listed on your webpage and not count those as work days even if we are open? Our last coach and current coach gave us different answers.*

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- Jenn- use our full-time equivalent page, it provides EFT breakdown and the 50%, share this with dept managers as a reference. I will share a link in the chat.
 - Katie-days worked is based on what the employee is working, and not what TRS says is the "day". Yes, our validation has certain days and a formula, but that's just for review purposes or declaring eligibility, which is why we don't provide specific days. You can provide the EFT schedule.
- Lorinda Johnson-*Are there any plans when adding an ED or RP record to allow the software to auto-populate once the SS# and DOB have been entered? Due to a district software conversion over the summer, I had almost 3000 errors that had to be fixed on the TRS side. I had 5 staff assisting me in entering, but it was dreadful. Manually adding all the fields for each record, when the system has the intelligence to auto populate, was difficult.*
 - Jenn-because employers have the option to upload txt file, in this case it was a software issue with conversion, but that's not something we're considering on our end at this time.

🕒 Substitutes

- What can TRS do to help employers better understand how to correctly categorize subs
- Who do we need to target? How do we get in front of those groups
- Ask about how their software is set up for substitutes? Are they using separate systems?
- What challenges do they face with subs?
- Jenn-please email later, if you haven't questions or feedback now.
Jennifer.Almanza@trs.texas.gov

🕒 RE Portal Chat

- Other than adding additional personal identifying information, what features would you like to see within our RE Portal Chat feature that would make this tool more beneficial?
- One example of feedback we received is not being able to provide any Personally identifiable information.
- Jenn-is there any other feedback to enhance the chat, to make you feel it would be worth using more often. Always feel free to email me later, if you haven't any feedback now.
- Brittany Sgarlat-Do you prefer we use the chat? We don't avoid it out of dislike

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- Jenn-not necessarily, it's an added feature for convenience.
- Kristi-*I've never used it because I've assumed it doesn't have a log of some kind that is emailed to us. I prefer having a written log of some kind.*
 - Mark, correct. There is not a log that the user can access, but we document the conversation on our end.
- Lorinda Johnson-My last two Coaches have been so responsive, the chat is no longer needed for me.
 - Mark- glad to see your comment, we receive 20 chats per month on average.
- Theresa Zlotopolski-I agree, our Coach responds in such a timely manner that we haven't needed to use the chat feature!
- Mark-your comments reinforce our thinking that email is more convenient, we wanted to confirm.

- **Questions**

- o Claudia Alba- *I have a concern regarding the TRS system shutdowns that occur over the weekends, particularly around the time when reports are due — especially the September reporting deadline. Specifically, when the system was shut down on **October 5, 2025**, it made it difficult for us to finalize and submit our reports on time. Would it be possible for TRS to avoid a full weekend shutdown during critical reporting periods next year? Having access to the system over the weekend would greatly assist districts in completing their reporting requirements on time and without interruption.*
- o Mark-we were down in October, a critical weekend, when we must shut down due to the Annual Interest job to meet a statute that we must mail out annual statements by a specific date, unfortunately, that first weekend. We understand the difficulty, but we do push out the grace period from 14 to 21 days.
- o Kathy Henderson-Yes, but that does not help with the payment.
- o Mark-we're still exploring what we can do related to that first weekend in October.
- o Claudia-Thank you.
- o Mickey Smith- It would be nice to have more than 2 or 3 days to get our reports complete, so we can have the correct amount to pay and not guess, then get penalties.
- o Rachel Jimenez- *September is a very labor-intensive report month. We also struggled with trying to figure out our money issues by the TEXNET deadline.*

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- o Brittany Sgarlat- Dual Credit, we have unique situations that include early college high school, with its own area and section of our school, with employees who are not college employees at all. In addition, we have dual credit that is on the ISD campus, and work that takes place before the school day starts... an employee teaching the dual credit class from the college. If during school day, and they're teaching at school, they are a school district employee, and we don't pay them. Wherever the class is held, we need to pay hours to TRS. We need to get personal information, but they're not our employee. How should we navigate this? We don't want to double report, while still being able to advise employees. We don't want to affect their eligibility.
- o Issue restated: we have dual credit on the ISD campus. The college would pay the employee, whether they are our employee or an employee of the school district. If they are teaching during school day, and they are teaching at the school, then the ISD pays. We are told wherever the class is held, then that employer reports the hours. But if they are not our employee, we need to get personal information and we receive pushback against this type of request from the employees who aren't our employees. If they teach before the bell, the ISD is asking for all the information because they need to report the hours, even though the employer is the college.
- o Jenn-the campus where the work is being performed reports the days and hours.
- o Katie-we can take this back and discuss it in more detail. Original decision was due to employer in that situation that couldn't determine what the hours were and based on feedback we made that original determination. But with new feedback we can discuss and share our determinations.
- o Brittany-this does happen often. Early College High School is not really related to the college, and their employees are not our employees, the instructors just teach those students.
- o Mark-what is your preference? Concern was pay vs hours worked. Employer reports hours and reports the pay, but what would you prefer in this situation?
- o Brittany- we would want to report them. If we pay them, we want to report the hours we pay them for. If they were teaching in the middle of the school day, an ISD employee on the campus, we gave them a stipend. Now, we don't pay them in the middle of the school day, but we don't pay them unless it's outside of school day. If you don't know what they're working on, you need to get that information from the school district, and they should report their presence. If you don't know the hours, that's not good.
- o Mark-we can take this back to legal. We've shifted depending on different issues. We will need to reach out to schools that participate in Dual Credit to revisit this.
- o Jenn-Any other questions?
- o None.
- o Meeting closed at 2:54:PM.