TEAM PROGRAM

TRS Enterprise Application Modernization

Employer Advisory Group
Meeting Agenda & Minutes

Date: 01/30/2026
Start Time: 1:00 PM
End Time: 2:30 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: ~~Jennifer Moen~~

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		**Kristi Kolaja-Jaggers**	UTMB Galveston	
Chris Brooks	TX A&M		**Misty Sanders**	Texas Tech	
Christine Spencer	ACC		**Laci Cramer**	Texas Tech	
~~Eric Kennedy~~	ACC				

Other Attendees not listed: Maria Medrano, TTU

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.*

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 :**
  - **Annual ED40 submissions (Jennifer Almanza)**
    - We received feedback from one of our larger institutions explaining the struggles they encounter with their software creating ED40s at the start of each fiscal year. They normally encounter this scenario for employees that do not have an annual contract such as administrators. This results in the employer needing to manually process ED40s.
      - We would like to identify if we have any other employers that are encountering the same issue and if so, how are you managing this process? What software do you use?
      - Responses:
        - Brittany Heim Sgarlat- we have that issue with part time employment with adjuncts. Because they're based on loads for the semester, we don't have all the information at the beginning of the year to get the ED40s created. We have the information for full timers, but not adjuncts. We use Ellucian Banner. The software might not be the issue; it's the timing of when we get the information from the campuses. There's an extended process to create the job for them to get paid.
        - Katie Tucker- instructors don't have a contract, open-ended employment year after year, because they don't have dates, it's a struggle to have the information.
        - Jennifer Almanza- any other feedback?
        - Kathy Rice- We had that problem a few years ago, but I find—we use Banner too—the year that's chosen in the parameters sometimes it's physical and sometimes it's calendar. Often, it's just late information coming in, and we didn't pick it up in the ED40 we ran, but sometimes I'll run a second ED to pick up those late ones.
        - Mark Chi- Ellucian allows you to do another run?
        - Kathy & Brittany—yes, you can.
          - Brittany—there are some options we can't utilize due to our type of organization.
        - Mark- this is helpful so we can better educate our coaches on these scenarios, so we can better support you all.
  - **ED40s submitted with Part-Time employment for TRS eligible employees (Jenn)**

- We are noticing a larger number of higher-ed employers reporting TRS eligible employees as TRS eligible with part-time employment. After reviewing, the employees are truly working more than half time and should be reported with full-time employment. If you encounter this issue, we recommend reaching out to your software providers to identify the reason.
- As a reminder, TRS eligibility and employment type should be reviewed at the beginning of each semester or when the original employment expectations have changed.
- Contract dates should reflect the dates the employee is working and normally align with student semester dates.
- Are you an RE that encounters that issue?
    - Brittany—it's not our system that's the issue, but lately we've had people within the system for less than halftime because we showed they are working elsewhere. We've had instances lately; we see them in the system without any errors showing. Sometimes we receive warnings in September, even if we can see they're working full time somewhere, it might be a validation issue. The system seems unsure if they have achieved the hours yet. As the year progresses, we don't see this as much.
    - Jenn-what might be the warning in September?
    - Brittany-we have a watchlist and check with coaches. It usually goes away after a month or two.
    - Jenn-any others experiencing this?
    - Kathy-Sometimes I must request overrides when the system won't accept entries.
    - Jenn—is the error because it's not eligible?
    - Kathy-it's normally that they are eligible, and the system won't accept the ED40 because they're part time.
    - Jenn-is "verify membership" the trigger?
    - Kathy-I don't remember the exact error.
    - Katie-I don't remember on the ED40, might be on the RP, verify membership.
    - Amanda Babcock-I support 8 schools; we have our own programming. Regarding September—when someone's eligible, it doesn't always get turned off with the new year. It shows as eligible because they're enrolled in it. We discovered a school that has turned everyone part time to TRS, basing it on full time 40 hours vs TRS eligible. They put some back to part time. They've made manual changes to their files for an unclear amount of time. File will automatically pull them into full time. I request that the campus lets me know if they're wrong, instead of making manual changes.
    - Mark-thank you for helping them out.

- Mark-question: for education, what can we do at TRS to help these types of campuses to better provide education and training? How can we get ourselves in front of these folks?
- Amanda- I suggest to them that they take your courses, but they decline. I have a Teams group, and I share the TRS calendar for courses. Some of these campuses split who does what file: HR vs Payroll…but some members aren't in my communication group, and they "fall through the cracks". We have a long document that doesn't work.
- Jenn-we can reach out to the employer.
- Amanda-that might be helpful, they have new staff that might appreciate the new training.
- Jenn & Leslie Barron—we will drop our email in the chat.
  - **Jennifer.almanza@trs.texas.gov**
- Mark-help us reach your peers, too. That's one goal for the EAG. Help us strengthen our abilities to provide one-on-one and group training. If your peers are new to TRS reporting and need help, we can reach out and visit on site. Let your peers know, we can initiate contact.
- Katie—the reason we bring this topic up is because we review accounts, see an eligible flag as "yes", and the employment is less than half time, prompting us to double-check the eligibility.

Concurrent Employment Best Practices (Jenn)

- A common topic that we hear from employers when asked about reporting pain points is related to concurrent employment. Mainly, we hear the struggles when employers make corrections to membership eligibility which results in all employers needing to go back to make corrections.
- We would like to start a conversation with our EAG members about some best practices you have established at your employer that you feel have helped identify and maintain concurrent employment?
  - Brittany-it's not necessarily a "best practice", but we use a code to mark someone we're putting in TRS who we see is eligible elsewhere. We mark them as "EO". If someone else has their contract, it's only telling us they have a contract, but not if they're less than half time.
    - You can also ask an adjunct if they're contributing to TRS, but they may not know the correct answer. Sometimes they're adjuncts at multiple institutions. We try to figure out and keep track of who we need to check.
  - Jenn---would adding employment type on the contracts be helpful?
  - Brittany—yes. "Concurrent" only tells us that they're eligible working elsewhere, but if we saw *why* they're eligible, that would be helpful—if we can receive an email notification on the front end rather than after our reports.

- Jenn—yes, you won't get the error until the 3rd. Someone is reporting, not that they're eligible. Add the employment type of eligible contract. Is there a possibility that it's incorrect.
- Brittany—multiple of us had that "yes" on less than half time, but now we're getting an override. Putting them in TRS can be hard too, because we don't know if they're coming back to work with us at the time.
- Jenn—we can take back the "adding the employment type" option and explore that solution.
- Jenn—any others with best practices?
- Jenn, suggestion: we can offer trainings to small groups of higher education employers in the same area that we see share employees, and facilitate outreach among the groups for sharing best practices: "How are you handling concurrent employment" and "what can TRS do to help you with concurrent employment?"
  - Brittany—I think that could be a good idea; we discussed this at a TRS meeting in the past. We suggested a legally approved list that can be shared among the entities.
    - We have a very long form to fill out every semester, that is time demanding. Ideally, TRS could share the information with us, instead: a regular update that we can keep among our routine practices. We don't have permission from employees to share their information for the current report option.
  - Mark-Brittany, thank you for sharing this information. We can explore and review these ideas; possibly sharing some data without employee or employer identification.
  - Kristi Kolaja-Jaggers- I certainly like the idea of meeting with other REs in the area to discuss strategies for concurrent employment issues

ORP – timely submission of TRS28s (Jenn)

- When an employee has elected ORP, TRS is not notified of this election until we have received the signed and notarized TRS 28 election form. Because of this, it is important for employers to submit these forms to us as soon as possible.
  - Helps reduce the number of adjustments needed and potential penalty interest.
  - REs that delay the submission of the 28 and reporting ORP employees can cause TRS to provide incorrect benefit information and cause other REs to report inaccurately.
  - In addition, TRS has identified a trend in employers deleting RP20 records for employees that have elected ORP from their monthly RP report due to the RP20 receiving an error. The error triggers because TRS may not have the TRS28 on file OR the TRS28 has not been processed.

    - Employers should not delete the RP20 record and need to reach out to their RE Coach for assistance in identifying if the error is triggering due to TRS not having a copy of the TRS28 OR if we need to process the ORP election on the member's account. Because of this. TRS may reach out regarding missed report transactions and deleted records.

- Currently, employers are asked to email these documents to BenefitProcessingSupport@trs.texas.gov to be processed.
- We would also like to invite our EAG members to attend our upcoming virtual training on “Completing the TRS28 and Reporting ORP” scheduled Thursday February 26 from 10-11:30 am CST. Our goal is for our EAG members to provide feedback on any other information related to ORP and the TRS 28 you would like additional training on that we do not currently cover in this session.
    - Click here to registration
- Jenn—are there any other trainings you feel would be beneficial to you?
    - Brittany—I usually send the TRS28 form to our coach electronically, but we also put it in the mail. Do you still need the original?
    - Jenn—you have the option of providing either one.
    - Katie—legal confirmed that TRS doesn’t need the hard copy, just the electronic form, but be sure to confirm it has been received by TRS before disposing of your copy, which can be retained at your discretion.
    - Mark, suggestion-- keep a copy for your own records in case you find we didn’t receive it.
    - Misty Sanders-we have an issue: when we send a bulk of TRS28’s to the “benefitprocessingsupport” email address, we find that some are missed.
    - Jennifer—we can check to see if there are any issues. I’ll reach out to the team. Let your coach know so we can figure out why that’s happening.
    - Amanda-I’ve heard that from some schools as well, but I’m not sure how they’re submitting them exactly, in bulk or individually.
    - Katie—are you sending one employee per file?
    - Misty—it only happens when we send a whole bunch at one time. We try splitting it up between different emails, and it’s still happening.
    - Jenn—I can check with the coach.
    - Mark—let us know when the email is sent, and we can figure out who is getting missed. It could be a system issue, a problem with the workflow, or our imaging process.
    - Kathy—I’ve had to delete my ORP people out before because our ED40s don’t work in Banner part of the time. The change in the ED doesn’t go through, for example, if they ended the TRS job and they started the ORP job.
    - Jenn—Do you delete the RP 20 from the file or the portal?

- Kathy—from the portal.
- Jenn—the system should allow you to submit and make the change, depending on timing. The RP 20 error should clear. Help your coach maintain some of the tracking. We want to be sure we're not missing employees that we're making adjustments for.
- Kathy—I add them back in, and when we get the errors, and we create the errors, we then have to wait for it to clear, open each person.
- Jenn—you should be able to re-submit the entire RP report through the validation. You can resubmit it as many times as needed through the system of validations, and the errors should start reducing. It will also catch changes that you can work on earlier instead of waiting until the end.
- Kathy—might be helpful, reduce clicks.
- Katie—when you click save, it's an instant validation. If you submit the report again, you may need to return to the system after some time to let it process.
- Nathan Farmer—if the ED45 is erroring out on front end, one thing that can happen is TRS may not have entered the 28 yet, so it might error out. Might confirm with your coach if the 28 is entered and then the 45 will go through.
- Jenn—that's another way to verify if the 28 has been received or is in processing.

RE Document Upload (Leslie)

- Our RE Document Upload guide has been published to the website and provides step by step instructions on how employers can upload documents through the RE Portal as well as information for specific documents that need to be uploaded to the Member Document Upload Site.
    - **Guide link**
- We would like to hear your feedback.
    - How many of our EAG members have used the RE Document Upload site?
    - Any feedback you would like to share?
    - Kristi—Is this where the 28's should be submitted? Captcha is difficult when I have to submit a lot of forms. Sometimes the captcha submits multiple scenarios when I'm submitting multiple forms.
    - Jenn—regarding 28 forms or SSA1945, that will link you back to the member document upload site. It's easier to send those through the email because those goes directly to the member's account. Bulk TRS28's should go through email. RE document upload site will show an explanation on where to upload.
    - Kristi-you're right, I was thinking of a different process.

- Katie—we do have a bulk option (up to 50 pages) through the upload site. If you scan them into one document. Make sure you follow the instructions within the paragraphs, and our imaging team will split it so they can go to member files. Document upload, if it's a form, it goes straight to member file, for bulks. Single files might be better to submit one at a time. Encouraging it to go to member document.

Error Resolution Virtual Training (Leslie)

- Last year, all EAG members received a survey asking for feedback on TRS training material, training topics, and online resources. Based on the feedback received, we created new virtual training topics specific to Error Resolution.
- Our first Error Resolution virtual session was on 12/11/2025 and went into detail on some of our most common ED errors.
  - Did any EAG members attend? If yes, would you like to share any feedback about the information we covered?
  - No feedback provided.
- If you were not able to attend this first session, we will be offering another Error Resolution ED training on Tuesday 4/14/2026.
  - **Click here to register**
- In addition to the ED error resolution training, we have also added an Error Resolution training for RP related errors which is scheduled on Thursday 4/16/2026 from 10-11:30 CST and would love to invite you to attend.
  - **Click here to register**
  - If you are able to attend, we would love to hear your feedback on the training information covered and what additional error topics you would like for us to cover in future sessions. Please feel free to email your feedback to Jennifer.Almanza@trs.texas.gov.

OMBUDs member resource information virtual (Leslie)

- Our TRS OMBUDS are hosting a series of short virtual presentations that provide REs with specific TRS resources available to you and your employees.
- The first two sessions were presented on Wednesday 10/29 and Thursday 1/22.
- Do we have any EAG members that attended one of these sessions and would like to provide any feedback on the information shared?
- List of upcoming sessions with registration links.
  - 3/24/2026 10-10:30 CST - Click here to register
  - 6/23/2026 10-10:30 CST - Click here to register

General Questions

- Kathy Rice—I had an incident where we had a working retiree, a bus driver for athletics, sometimes going over his hours and triggering surcharges. I have previously emailed TRS some questions on this issue. When we're paying, it's hard to predict what the surcharge will be. We had to make it match what TRS said.

- Jenn-surcharge is triggered in the month when the work was completed. The pay in January.
- Kathy-that requires us to forecast. The pay you're collecting on, we didn't place the surcharge. We didn't know he was going to work over his hours in December. The employee has since gone full time, but this created a mess at the time.
- Leslie—We can provide training.
- Amanda—we always pay it late because it's hard to know.
- Brittany—ours is the same.
- Amanda—for surcharges, you end up 3 months behind, typically.
- Kathy—you must clean it up months later, a manual change, often against an employee that's gone.
- Amanda—one "cheat" is an off cycle: date it one month prior. You're not sending it to TRS for 2 more months. It's a lot to keep track of.
- Brittany-- it has to be a manual process. Payroll is paying for hours you're reporting in the month.
- Amanda—you usually end up owing less than what you expect.
- Mark—very true. Good points.
- Leslie—any other questions?
- Brittany—quick question: last time we discussed the availability of "years reporting" being visible to employees in their MyTRS accounts...for them to be able to see what ERS can see. We, as employers, understand that we shouldn't be able to see this information, but it would be helpful if the employee can see their time. It would be helpful if they could see when they will have benefits or eligibility.
- Mark—we're still reviewing this one. In the past, we've had employers reaching out, and we were concerned about what we can provide. We're brainstorming some ideas. We also have your dual credit issue in mind. We're still trying to work out a situation or solution we can propose with our legal department.
- Brittany—at least put what ERS can see for the member, even if we—as employers—can't see. We direct them to MyTRS.
  - Re: Dual credit, fortunately we aren't currently experiencing that problem.
- Brittany—another thing that might be helpful: the names for concurrent employment. I'm able to see information that Payroll can't. Names that match ID, but not the social. We spend a lot of time verifying names on ED25's.
- Mark—this is a long-running issue. Our suggestion is for the member to submit the same social security card to both institutions, but we know it doesn't always work that way for various reasons. We want employers to report what's on the SS card and all concurrent employers they're working with. Can you share specific scenarios?

- Brittany—the other employer puts a name in system based on ID not the Social Security Card. The other employer takes what's in their system for granted without verifying. As our reporting period gets smaller, those errors cost more time.
- Kristi—on our end, we do not keep SS cards on file, getting the card from a member can be difficult sometimes. We have specific employees that want their names to appear a certain way, and so our generated information doesn't match. This is a frequent issue to manually edit RP20 records for people whose names are not quite right.
- Mark—we tell members that what's on your Social Security card is reported to us. We need to make sure we're reporting the proper name for IRS purposes. We issue additional payments, refunds, and annuities. We can suggest some articles on the updates. Kristy, what software do you use?
- Kristi—HCM PeopleSoft.
- Mark—did your employer program that themselves?
- Amanda—We use nicknames on PeopleSoft. We just tell them "sorry it has to reflect the SS" and "if it needs to be different you will need to get your SS changed", but we do have a nickname slot for first names, but that only feeds onto display…not on anything that's printed.
- Kristi—I believe it's custom coded. Most of the time it's a suffix issue (jr., third, etc).
- Amanda—maybe they need their social security name changed?
- Mark—we might need to have a conversation with the software. Recognizing it's an employee demand.
- Amanda—on PeopleSoft, if it's their check—in payroll—you can change the name on the check, that's what we use for "estate of". That might be an option too. This doesn't feed to anything else.
- Kristi-thank you.
- Mark-very helpful.
- Leslie—any other questions?
- None asked.
- Mark-thank you for taking the time to meet with us.

Meeting ended at 2:23 PM