Employer Advisory Group
Meeting Agenda & Minutes

Date: 01/29/2025
Start Time: 2:00 PM
End Time: 3:30 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, Nicholas Gonzalez, ~~Kevin Wakley~~, Leslie Barron, ~~Chris Cutler~~, ~~Erica Villarreal~~, ~~Jennifer Gasior~~, ~~Megan Van Winkle~~

Non-Higher Education EAG Members and designated participants:

Becky Bunte	TASBO	~~**Mary Ramon**~~	Northside ISD	
~~**Christine Porter**~~	Spring Branch ISD	**Mickey Smith**	Crandall ISD	
Claudia Alba	Pflugerville ISD	~~**Nancy Wiggins**~~	Maypearl ISD	
Claudia Wilko	Northside ISD	**Rachel Jimenez**	Conroe ISD	
~~**Ginger Gamble**~~	North East ISD	~~**RL Richards**~~	Muleshoe ISD	
~~**Greta Graham**~~	Uplift ED	~~**Sherry McGraw**~~	Sulphur Springs ISD	
Jeffrey Coats	North East ISD	~~**Tammy Cunningham**~~	ESC Region 8	
~~**Judy Como**~~	Judson ISD	**Tera Harris**	Spring Branch ISD	
~~**Kathy Henderson**~~	Aransas County ISD	**Theresa Zlotopolski**	Clint ISD	
~~**Lisa Roberts**~~	Judson ISD	~~**Tiffany Yarbrough**~~	Sulphur Springs ISD	
Lori Johnson	Hutto ISD	**Tonya Davis**	TASBO	
~~**Lynn Nicholson**~~	Mason ISD			

Other Attendees not listed: Frances Whitaker (Judson ISD);

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.

TEAM PROGRAM
TRS Enterprise Application Modernization

AGENDA

- **Questions / topics from EAG members (Katie):**

  - 🕐 **From Lori Johnson, Hutto ISD:**
    - I have concerns about employees retiring at the end of the school year. If retiring, we pay off their assignment with a lump sum in June. However, the TRS retirement certification may not get populated in the portal until after Sep. 1.
      - Is this still the course of action? If so, *how can we get those certifications earlier* if the employee has already been paid off for two months.
      - Retirement certifications are not sent to REs until the retirement application has been processed and the retirement date the member applied for has passed. The certification will *not* be sent prior to both conditions being met.
      - For example: If the member elected August as their retirement date, the certification would not be sent to the worklist in the RE Portal until Sept. 1st.
        - This maintains confidentiality
      - Prior to receiving the retirement certification, we recommend submitting an ED90 record including the termination date and the final report month for the member once your RE has issued the final payment.
      - Lori-yes, this answered my question. Last year, there were a couple delayed until Sept 2.
      - Katie, let us know if you encounter these.
      - Mark, let us know so we can address issues within our logic.

  - 🕐 **From Jeff Coats, North East ISD:**
    - [Can] you address how the new directive from the Federal government will affect TRS reporting?
    - Similar to Reporting Employers we are reviewing the information as it becomes available to determine the possible impact to TRS reporting. If you have any specific programs that you already know are impacted, please email those to us for our review or we can schedule a call to discuss further.
    - We encourage each RE to begin considering any Federal funding that your RE uses to pay Eligible Compensation to employees. Such as Child Nutrition. As you find
    - We will send out communication to all REs as soon as we can.

- **Information from TRS (Katie):**

  - Maintenance Release Enhancements:

    - In Dec. 2024, an enhancement was made to the RE portal to allow REs to use the Search Reports screen in RE Portal to search report data for the current year plus 5

prior years. Prior to the enhancement, REs could only search the current year plus 2 prior years.

- There was also an update was made to the system generated RE Ledger overage/shortage emails that are sent the last business day of each month. The email will no longer be sent if all the RE's ledger balances are at zero. If an RE has any balances, positive overage or negative shortage, the emails will still be sent. The emails include a breakdown of all RE Ledger accounts that either contain a shortage or an overage.

- Lastly, in Dec. we fixed a defect related to Service Credit Purchase payroll deductions error, 402, that REs were receiving incorrectly. REs should no longer see error code 402 for invalid reasons.

- Looking forward we have some Retirement Certification Updates planned for Feb.

  - The Final Report Month field is being added to the certification after selecting "No" for the field *Was the participant in a TRS membership eligible position in the last school year of employment*. The Final Report Month field will be required FRM field even if member was not eligible.

  - Further, for the ineligible employees you will receive a pop-up message after clicking certify as a reminder to submit an ED90 record including the termination date and Final Report Month.

  - Normally if the only positions held by the employee were not TRS membership eligible, we would not require the Final Report Month. However, if the employee is retiring from TRS we need the Final Report Month to finalize the retirement. Please note that you may receive a warning message on the ED90 but that will not prevent the record from posting to the member's account. If you receive an error on the ED90 and need assistance, please reach out to your RE Coach.

  - We are adding an email notification to REs when a Retirement Certification has been Reinitiated. This occurs when our Retirement processing team has additional questions. The email will acknowledge that the retirement certification was previously completed, but more information is required, and please refer to the comments section of the certification.

    - A reminder email will be sent if the retirement certification is not completed again within 7 business days.

- In Feb. we are also adding additional report month tabs to the View and Create/Maintain RE Report screens in the RE Portal. After the Feb. release, you will now be able to view a total of four report months. As an example, in Feb. you will see Oct., Nov., Dec., and Jan. report month tabs on the screens.

- Website Content (**Katie**):

  - Employment after retirement limits page. Currently a table with same limits, comms wants to make it Sept-Aug all limits the same. Asking EAG what their preference is

    EAR Limits for FY25

Month	Number of Hours a Retiree Working One-Half Time or Less May Work Without Triggering Surcharges	Number of Workdays Retiree Combining Substitute and Other TRS-Covered Employment May Work Without Triggering Surcharges
September 2024	92 hours	11 days
October 2024	92 hours	11 days
November 2024	92 hours	11 days
December 2024	92 hours	11 days
January 2025	92 hours	11 days
February 2025	92 hours	11 days
March 2025	92 hours	11 days
April 2025	92 hours	11 days
May 2025	92 hours	11 days
June 2025	92 hours	11 days
July 2025	92 hours	11 days
August 2025	92 hours	11 days

    - Katie-Do you see any challenges with this update?

      o Lori, I don't see any problems.

- RESS Survey (Jenn):

  - An email went out to all REs yesterday regarding our annual Reporting Employers Satisfaction Survey and Information has been included in our January Update newsletter. Emails will begin going out next week starting Feb. 3, 2025.

  - If you do not receive the survey and believe you should, please email address SatisfactionSurveys@trs.texas.gov

    - Mark—adding, this year we're sending surveys differently. We missed staff contacts in the past, this year we are sending to all RE contacts with a few exceptions. Trying to capture those who are really doing reporting. Those who aren't reporting can select "no" to end the survey.

    - Claudia Alba: Hello Mark, in the email notification, will there be instructions to select "No"?

      o Jenn- not sure if it will include this instruction, can confirm.

- Report Completion Data for Due Date and Grace Period (Jenn):

Report Month	# of REs Completed by Due Date	% Completed by due date	# of REs Completed by Grace Period	% Completed by due date and grace period
September 2024 RP	878	65.57%	336	90.66%
October 2024 RP	956	71.40%	356	97.98%
November 2024 RP	1026	76.7%	1321	98.7%

- This information was requested in the October 2024 EAG-all meeting.

- Training Initiatives (Jenn):

  - Discuss the current substitute eLearning available on the website and currently working on recorded RE trainings. Retirement Cert and VEI first to be recorded and posted to website (goal date of 03/2025).

    - Link shared in Chat: https://rise.articulate.com/share/bza9UzB4XLWoswlHiYHIA1TqnUrUP41s#/

  - Recorded sessions

  - In person sessions: In Spring 2024, we piloted one-on-one RE trainings with 40 Reporting Employers. Our goal was to provide personalized training based on topics the RE specifically requested additional trainings on and reviewing some of their common errors related to TRS Reporting. Because of the success we have seen, we are beginning to plan the next round of sessions.

    - Our current plan is to schedule these one-on-one sessions starting in February and ending in April. Additional information will be going out to REs who have been selected at the beginning of January. If you are interested in participating in this next round of sessions, please email me your request at Jennifer.Almanza@trs.texas.gov

- Summer/Fall Workshops (Jenn):

  - We plan to visit all 20 Education Services Centers starting the last week of July through August. During these sessions, we will provide legislative updates that may affect TRS Reporting and offer topic-based trainings.

  - What topics do you think would be beneficial to present during these sessions?

- Begin visiting in July through August.

- Can email to *Reporting@trs.texas.gov* if there are any specific topics or recommendations on what to discuss during these sessions.

- **RE Report Status (Jenn):**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
November 2024	1337	99.93%	1
December 2024	1334	99.70%	4

- **Questions**

  o Claudia Wilko- Question regarding Development team, can we "view employee status," but not just one by one, to see if they are a member or retired. You mentioned looking into this. It still takes a lot of time to look one by one, it would help if we could check all our employees and download the status in a list. We check when we hire them, and the system shows one thing, and two weeks after we see the status has changed with updates in system and we receive errors regarding new member status. Are there workable solutions for a list of employee status?

    o Katie, we have spoken to our developers on many occasions, and we cannot implement this now, but we are looking into possibilities in the future.

    o Katie, speaking to "new member" status, you are right. One thing to look at is the number of days remaining in the new employee membership or check if they're still with another employer, it can be a conversation starter with that employee. We will keep this issue on our list.

  o Claudia Alba—you're not releasing retirement certification until the last date, requiring a special run. Is there a way to get this information before the certification?

    o Katie, the main difference is the member was providing the form, and now we're notifying the district. We want to make sure the employee has had time to speak

with their employer before sending information. They were getting the paper form with their estimate. My question: are the employees notifying you?

o Claudia-our policy is we can't process leave pay outs unless we receive certification from TRS or ERS.

o Jenn—confirmed.

o Mark- when we used the TRS7 paper form, that triggered a confirmation for your group?

o Claudia-correct.

o Mark-from TRS' side we don't see the retirement happen until we receive the application.

o Claudia-I understand it's in the employees' hands.

o Mark-we're trying to work through the notifications of the retirement being certified.

o Claudia-suggests: let us know the employee is looking into retirement. We have received complaints from employees about delays.

o Mark- we have limitations on what we can share, as much is confidential. We promise our members not to share when they're looking into retirement with their employers. We will continue looking into the notification process.

o Claudia-thank you

o No further questions. Meeting adjourned at 2:53PM