



Employer Advisory Group Meeting Agenda & Minutes

Date: 12/14/2021
Start Time: 10:30 AM
End Time: 12:00 PM
Location: Microsoft Teams

Type of meeting: Periodic
Meeting called by: Erica Villarreal
Minutes by: Erica Villarreal
Invitees: Barbie Pearson, Frances Torres, Mark Chi, Katie Tucker, Molly Grosskopf, Carol Casey, Ashley Conrad, Chris Cutler, Nicholas Gonzalez, Andrea Morales, Sarah Valenti, Meera Krishnan, Kevin Wakley, Caitlin Kennedy, Catarina Saucedo, Nathan Farmer, Jennifer Almanza, Teresa Menchaca

EAG Members and designated participants:

Ashley Penny (UNT)	<u>Betty Su Williams (UT Houston)</u>
Betty Butler (DCCCD)	<u>Christine Okanla (ACC)</u>
Diana Salami (Tx State)	Neal Wise (UT)
Karen McDade (TX A&M)	Annel Perez (South TX College)
Kathy Rice (Midwestern State)	Kim Ray (UT Medical Galveston)
Andrew Charpentier (UT Medical Galveston)	Lacy Kramer
Tony Luna	Ashley Penny
Joya Vidaurri	Laci Cramer
Amanda Babcock	

Other Attendees:

Microsoft Teams: 737-220-2496
Conference ID: 765 695 573#

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 entities. 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 entities in their region and bring questions and concerns from those entities to this group.

Please...

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

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AGENDA

- **Questions / topics from EAG members**

- How are Coaches selected for each agency?
 - *There are many factors that we consider when assigning a coach for REs. These include but are not limited to RE size and if the RE contact submits reports for multiple schools.*
- Can an agency request a different coach?
 - *When a request is received, TRS management can consider assigning a new RE Coach. If an RE would like to request a different coach, please contact Katie Tucker directly at katie.tucker@trs.texas.gov. We will schedule a meeting to discuss your concerns and work together towards a solution.*
 - *Current response time is within 2 business days. Please be assured that the coaches are working diligently to get back to you as quickly as possible. Each coach currently has an average of 111 REs that they are responsible for assisting. Long term planning is to reduce the number of RE's each coach is responsible for assisting.*
- Can TRS provide agencies with a copy of the State Auditors question that are being asked in order to get an override on a file?
 - *The requirements for supporting documentation is based on feedback from the State Auditors and TRS Internal Audit. TRS uses the information provided by the RE to justify*

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why the error was bypassed. Based on the feedback from SAO & IA, TRS established the procedures to gather information that supports the bypass.

- Why do we have to request for so many overrides, which errors FALL in the above State Auditors questions?
 - *Any time we complete an override it is bypassing the established validation in our system which requires us to gather the information to justify the override. This is a requirement set by SAO.*
 - *TRS is in the process of reviewing our override process and the current validations to see if there are some areas that can be improved and the need for overrides reduced.*
 - *There are some validations that TRS does not have the functionality to override. Your RE coach will provide guidance on how to resolve the error.*
- *When waiting on an override, will we be penalized? The system will automatically apply the fee on late reports. The system automatically applies. If you feel the late report was beyond your control, please contact Katie Tucker.*
- *Diana- on portal we do not have a coach's name listed. Some employers have not been assigned a new coach yet, however a coach should have been contacted by now. If you have not been contacted, please contact Katie Tucker.*
- *Per Mark Chi- Katie and I have been looking at this override process and validations together and constantly reviewing. Looking at different ways to improve the process.*
- **Information from TRS**
 - **TRS Year End**
 - *2021 was the first Fiscal Year since go live in the new system to have 100% of all REs complete for annual statements. Thank you for the part you and your school played in accomplishing this milestone.*
 - *Annual member statements have been mailed. If there are discrepancies, review the salary paid from September through August for the year in question. You can also review the payroll transactions reported on the View Employee Information screen to identify any discrepancies. If you need help with corrections, please reach out to your RE Coach.*
 - **Penalty Fee Grace Period**
 - *No change to the PF grace period for the remainder for FY 2022. Will remain one month grace period.*
 - *Full schedule of due date and grace period deadlines are on the Penalty Fees page of our website. Reporting Employers-> General Information -> [Penalty Fees](#)*
 - **Employer Toolkit**

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- *TRS members experience various personal and career changes in life. To help guide our Reporting Employers (REs) and our members through these changes, as they relate to TRS, we've developed an [Employer Toolkit](#). The online toolkit provides many helpful links and resources to inform and guide you through any necessary actions.*
- *The toolkit consists of two categories: [Personal Events](#) and [Career Events](#). Each category provides a list of events a member may experience over the course of their membership. To access information about a specific event, click on the title and additional resources will show on the screen.*
- *We hope you and your employees find this new resource valuable as you navigate and discover information about your TRS member benefits.*
- *Can EAR retirees find information on the website to avoid potential expensive errors? Especially when they are working for multiple REs. All training information, brochure links attached to the tool kit. FJT- working on an interactive video that is being working on for retirees to review. Will Res be charged penalties and surcharges when it is the retirees' error? KT- submit the Texnet for correct Adjustments report that applies to 1 business day it will not charge the penalty. These new employees that start that we start, they are a new member. They don't keep employment for a month. By the time its time to report, the employee is no longer employed. The RE runs them as a new member, but TRS will not accept them as a new member. Katie will look more into this issue and review statutes and get back to Kathy.*
- **RE Survey**
 - *TRS has once again commissioned the Public Policy Research Institute (PPRI) at Texas A&M University to conduct the annual Reporting Employers Survey. The survey is designed to provide TRS with feedback so we can continue to improve the services we provide.*
 - *The survey will be confidential, so please provide your honest feedback. We look forward to sharing the results with you and working to improve our customer service. If you have any questions about the survey, feel free to email [Sunitha Downing](mailto:sunitha.downing@trs.texas.gov) (sunitha.downing@trs.texas.gov) at TRS or [Kirby Goidel](#) at PPRI.*
 - *To be sent beginning the week of January 31*
- **Upcoming TRS Trainings**
 - *Spring 2022 Trainings to be published soon*
 - *Will be announced in January 2022 Update Newsletter & other communications*
- **Defects fixed recently**

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- *EAR Certifications*
 - *Certifications are being generated each day that it remains incomplete. Please complete the certification the day you receive the notice if possible so additional certifications are not generated.*
- *818 validation - Refund exists after the Employment Start Date. This was corrected this last weekend during the last system update.*
- **Scheduled fixes**
 - *ER27 defects*
 - *Various defects all to be fixed as quickly as possible. Workaround for most is an override. Contact your RE coach.*
 - *Spring 2022*
 - *IRS Salary Cap Defect*
 - *346 Validation - Member 'XXXXXXXXXX' has reached the Federal IRC 401(a)17 limitation of \$285,0000.00 for FY 2022. Please submit any future regular payroll records with '0' TRS Eligible Compensation, '0' Contributions, and actual number of days and hours.*
 - *To be fixed early in Spring 2022*
 - *Andrew- 1 or 2 employees in the last year have been employed both multiple REs. Is there a way we can see what has been reported by the other RE. KT- we cannot share what has been shared by other employees, due to confidentiality laws. One recommendation is to use the View Employees- 401(a) limits screen in the RE Portal. This screen shows all salaries reported by all REs.*

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- RE Report Status

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
September 2021	1339	99.6	5
October 2021	1322	98.4	22
November 2021	1049	78.1	295

- Additional Discussion

Kathy- Address changes; someone has put a period. TRS is not using this information? Will it be used eventually? Mark- we want to explore to find a way for these addresses to come in again. We have to build in different validations to make sure addresses are correctly entered.

Diana Salami- ED files have been submitted to correct employee names. What causes this issue? Even though we have corrected the issue? KT- the individual could have more than 1 employer and the mbr has not notified the other employer. The RE can reach out to the coach to find out what's causing the error.

Kathy had a question on a recent certification. The employee is going to terminate on January 15, but currently still employed. Should I put the last payment out there. If she is not termed, TRS will get the cert back and we will issue a letter to the member saying that the employee is still employed. If you say she HAS been termed, it ends the employment on TRS which prevents the RE from reporting this employee. If we enter a future date of termed date, will it still prevent the report from going through. It should not prevent the report from going through.

If Cert is completed, then find out later the employer owes the employee, what happens to the contributions? If acct is closed on TRS side, employer is responsible for returning the contributions back to the employee. Is the RP 20 file deleted? Yes.

Meeting ended at 11:42am