



Employer Advisory Group Meeting Agenda & Minutes

Date: 11/17/2022
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, Ashley Conrad, Brandi Gardner Nathan Farmer, Jennifer Almanza, Catarina Sucedo, Nicholas Gonzalez, Kevin Wakley

EAG Members and designated participants:

Dawn Cummings	ESC Region 3	Tammy Cunningham	(ESC Region 8)
Gerianne Neumann	ESC Region 3	Mary Ramond	Northside ISD
Becky Davis	Conroe ISD	Lynn Nicholson	Mason ISD
Emily Youngblood	Flour Bluff ISD	Christine Porter	Spring Branch ISD
Claudia Alba	Pflugerville ISD	Tera Harris	Spring Branch ISD
Rebecca Davis	Conroe ISD	Mickey Smith	Malokoff ISD
Greta Graham	Uplift ED	Lorinda Johnson	Hutto ISD
Nicole Dean	Judson ISD	Sherry McGraw	Sulphur ISD
Lisa Roberts	Judson ISD	Tiffany Yarbrough	Sulphur ISD
RL Richards	Muleshoe ISD	Theresa Zlotopolski	Clint ISD
Becky Bunte	TASBO	Jeffrey Coats	North-East ISD
Tonya Davis	TASBO	Ginger Gable	North-East ISD
Lana Walls	Ranger ISD	Kathy Henderson	Aransas County ISD
Nancy Wiggins	Maypearl ISD	Samantha Blevins	Midland ISD
Alisia Pena	Round Rock ISD	Jackie Thomas	Amarillo ISD
Gerianne Neumann	Round Rock ISD	Judy Como	Judson ISD
Claudia Wilko	Northside ISD		

Other Attendees:

Microsoft Teams: 737-220-2496
Conference ID: 205412918#

TEAM PROGRAM

TRS Enterprise Application Modernization



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*

AGENDA

- Questions / topics from EAG members
 - TRS 7- Has there been any changes planned to allow a default semester date, used ED90 or populate any fields?
 - *TRS is still in the process of modernizing our retirement application processing. We anticipate this to be completed in Spring 2023. Once the modernization has been completed we will be able to explore possible enhancements to the TRS 7 certification process for employers.*
 - *Samantha Blevins- list of completed TRS 7 forms in the portal? We keep a copy, but we have seen a confirmation it is saved but it never was received in the member's account.*
 - TEXNET Due Date- If the TEXNET due date is November 4, does that mean the TEXNET can be entered into the system on November 4 with a transaction date of November 7?
 - *TEXNET payments must be submitted by 8pm CT on the due date to be considered on time. In the example of the October 2022 RP TEXNET, it must be submitted by 8pm*

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CT on November 4. We anticipate that the payment will be remitted on the due date, with November 7 as the settlement date in this example.

- Upload list for New Member Query- Is there a possibility of uploading a list similar to a report for new member to obtain data for a list of new hires?
 - *This is not an option that TRS will be able to provide to employers due to the significant security risk to our members.*
 - *Claudia Alba- could a validation be added to ED20 for New Member?*
 - *Claudia Wilko- large district is really large district, 30, 50, 100. Just upload the file in the system. Could this be reconsidered?*
 - *Becky Davis- regarding the upload file. We do get the new member error with the RP report (for calculations) so if we could submit a new hire report that kicks errors of relevant information (surcharge, new member), that would be great.*
 - *Tonya Davis- trying to get the information so you can code it correctly on the RP and could cause the TEXNET to be shortage. Manual adjustments to reports, vouchers and GL adjustments. Need it up front and the volume is tremendous. Upload an excel sheet and then y'all send a report back without querying the system directly.*
 - *TRS does see the benefit for our employers but unfortunately it is a large risk. We will continue to review*
- Overrides- we are still finding it takes 3-7 days for overrides, which would never allow our reports to be completed by the due date. We had 59 in November.
 - *We are still in the process of training additional coaches and we anticipate the additional coaches will improve our service to employers. I will be speaking more on our staffing here on the reporting team in a few minutes.*
 - *Tera Harris- the delays we have, by the time it reprocesses a new error populates. When someone is incoming or outgoing, back and forth name changes. What is a space in a name a hard error? We all know that our RP records have mismatch, hours and days do not match. My standpoint is that we can't start until day 1. Report with hours and days in separate reports. If it wasn't combined, we could start running the report as soon the payroll is finished but have to wait until the first day of the month to report the hours. Makes it almost impossible to get it complete by the due date, seems like it would be impossible to achieve*
 - *Nancy Wiggins- get maybe four days to get all the information to you, 5th & 6th are lost. I'm not exempt so I can't work extra without approval. TRS is closed so we have 3 days with actual support from TRS. Cram all of this*

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information into a report in such a short amount of time. Pushing those dates out to allow more time.

- *Mark- I see the benefit of reporting pay and time worked separately, we would have to make sure this would be a fit for all RE types if we were to request to split the RP report into 2.*
- Error Display on Portal- could a position code be added?

<u>SSN or TRS- Assigned Temp ID</u> ⚙	<u>Employee Name</u> ⚙	<u>Record Type Code</u> ⚙	<u>Error Code</u> ⚙	Description
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- *We have two enhancements that will be added to the RE Portal next month in December 2022. These enhancements will be adding the position code to the report warnings and error screen as well as allowing REs to download the report errors/warnings as a CSV file.*

- **Information from TRS**

- TRS Staffing

- RE Coaches

- *Currently have 23 RE coaches on staff*
 - *1 vacancy, 6 in training, 16 coaches working independently*
 - *Average # of REs to coach is 84*
- *Compared to November 2021*
 - *5 vacancies, 11 RE coaches working independently, average of 122 REs each*
- *Continue to work towards around 60 REs each, the most recent coaches have been released with 60 REs*
- *While we strive to respond to your questions quickly, current coach response time is two business days. Please take this into consideration when working on reports. Be sure to allow enough time to work through errors and request needed overrides to complete reports by the due date.*
- *Our goal is same day/within one business day response time. We are exploring additional software applications that will help us measure response time and ensure that we achieve our goals.*

- Reporting Exceptions Team

- *This is a separate team from the RE Coaches*
- *10 team members*
- *Started with FY 21 and 22 deleted records, beginning to expand to other exception reports.*

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- *Submitting adjustment reports for employer contributions and not submitting the TEXNET within 1 business day of the report completing.*
- *Penalty Interest webpage provides more detail about when interest is charged*
 - *Tonya Davis- if the district already has the funds it should not include interest? Update newsletter- re-run a reminder about the Penalty Interest*
 - *Becky Davis- We seem to get small interest fees (very small) when we are notified a part-time retiree also worked at another district a month or two later.*
- **Error Message Validations**
 - *Have been reviewing the 800+ validations and will be updating the language so that it is easier to understand what the issue is.*
 - **Mark** *to share some examples and ask what the REs would like to see?*
 - *Nancy- appreciates that it would include some extra instruction within the message, think it will help a lot.*
 - *Becky- Having the position code will certainly help error 162.*
 - *Lori- on the error codes with the % like with SM. Says this amount is not correct, I know what those rates are and they do not know what those rates are. The clearly knows in the background it's not right, would it be difficult for the messages to say "the correct amount is \$\$" or "the correct percentage rate is".*
 - *Tonya Davis- SCP installment the last payment goes into and gets posted to the account, don't always know when that will end. An email to the RE that the payment has ended or will end in the near future.*
- **RE Survey**
 - *TRS is once again conducting an 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.*
 - *Scheduled to be sent in February 2023, we will send out an email as a reminder.*
- **Upcoming TRS Trainings**
 - **Piloting new training modules**
 - *Our goal with these modules is to reduce the length of training sessions so it's easier to fit into your busy schedules and to provide topic based training so you can tailor your training sessions to your needs.*

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- *This Fall we added a Membership Eligibility training and in the Spring we will add Employment After Retirement.*
- *We have some ideas for additional modules but wanted to see if there are any topics you would recommend for a topic based training.*
- *Spring 2023 Trainings will be published soon*
 - *December 2022 Update Newsletter*
 - *RE Portal Training->[RE Portal Virtual Training](#)*
- **Recent Fixes**
 - *Fixed the refund certification for all scenarios but one:*
 - *If the employee had eligible employment and is now working as a substitute only, the certification errors. Please work with your RE coach for the workaround.*
- **Scheduled fixes**
 - *As mentioned at the beginning of the meeting, we have two enhancements that will be added to the RE Portal next month in December 2022. These enhancements will be adding the position code to the report warnings and error screen as well as allowing REs to download the report errors/warnings as a CSV file.*
 - *We continue to focus on user experience tickets in our maintenance and enhancement planning that will improve your experience in the RE Portal.*
- **RE Report Status**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
September 2022	1,326	98.37%	22
October 2022	1,113	82.57%	235

- **Additional Discussion**

Claudia- TRS is the team here next week? And when is the next meeting? October Update Newsletter provides TRS office closings.

Nancy Wiggins- TRS 587 pending question. Katie will follow up with Legal department and will update the group.