



Employer Advisory Group Meeting Agenda & Minutes

Date: 12/7/2022
Start Time: 1:30 PM
End Time: 3:00 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 Saucedo, Nicholas Gonzalez, Kevin Wakley

EAG Members and designated participants:

Annel Perez	S.Texas College	Betty Su Williams	UT HSC
Misty Sanders	TX Tech University	Kim Ray	UT Medical Branch at Galveston
Karen McDade	TX A&M	Kathy Rice	Midwestern State University
Betty Butler	Dallas County Com College	Ashley Penny	UNT
Christine Okanla	Austin Community College	Neal Wise	UT System
Christian Hiner	TX State University	Amanda Babcock	UT System
		Roxanna Van De Graaf	UT System

Other Attendees: Debbie Dowdy, Brittany Heim, Michaelyn Greene,

Microsoft Teams: 737-220-2496

Conference ID:

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.

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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**
 - Seems like more errors are popping up each month and requires more overrides and explanations. This is creating more work for TRS and the end users. There also seems to be a lot more defects that are not being resolved.
 - We have ED files from summer months not posted because of the email address/phone number issues. Is this going to be resolved?
 - *We currently anticipate this to be resolved this month during our maintenance schedule for Sunday, December 11, 2022.*
 - *ED20 records are not required on an annual basis for returning employees.*
 - 2 of our purchase service members wont post and we must request an override each month. We are required to write a lengthy explanation on overrides and then still must wait on our coach to send to “consultants” this has been becoming weeks ordeal instead of the 24–48-hour response time. Are other schools experiencing this?
 - *We need some more information to determine what is causing the RE to receive this error. If you can forward over the example I can research further.*
 - Error 802 (days reported in first month) was supposed to be fixed as well and it is still happening.
 - *This is a valid error and will populate if you have not reported time worked in the first month of the employee’s contract.*
 - *Example, if the eligible contract began 9/1 and days worked are not being reported for September, you would receive error 802 for the employee.*
 - *We recently made an adjustment to the validation to not populate the error if the RP25 is being submitted to delete a transaction. If you are receiving error 802 when using an RP25 to delete a previously posted RP transaction, please send over an example so we can review further.*
 - The deleted records are a 2-step process, then we get emails wanting another explanation. This seems redundant.
 - *Some of the deleted record reasons require additional review and follow up with our REs. We do consider the information provided under the deleted record reason when we determine what additional information we may need from the RE.*
 - *We do not follow up on everything, we review the information and then we follow up when we have additional questions and clarification.*
 - When will TRS provide a secure server download of files for our reconciliation?

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- *A CSV file is available to download for each report type and RE ledger. Under Search Reports in the RE Portal, you can download and compile multiple ED or adjustment files into one CSV as well. This can be over multiple report periods or per report period. This data should allow you to reconcile the information in your system.*
- *We also recommend that if you make changes in the RE Portal to a report that you mirror those changes within your software.*
- Is there documentation for reporting people on leave? We had a couple of people on our September file that were on leave so no hours being reported but they had pay (since last half of august pays in sept). It errored needing hours reported in first month.
 - *Did the employees begin a new contract/work agreement at the beginning of September?*
 - *If an employee did not begin a new contract/work agreement due to the leave, we would not have expected an ED40. We expect contract/work agreements to align with when an employee is expected to perform work for your RE in that particular position.*
 - *If they did begin a new contract/work agreement, but on leave, we would need confirmation that the employee was on leave, when they were anticipated to return and when the compensation was earned for the possible override. Please ensure the appropriate zero day reason code is being reported on the RP record.*
- What would cause an ED20/ED40 to be stuck at Valid?
 - *There is a data conflict that is causing the record to fail to post. This is a primary focus of TRS and we expect an improvement in this area over the coming months.*
- How does TRS keep up with these pending items from RE's. Do they have a tracking mechanism? With the size of our RE it is hard to keep track of pending items from prior months.
 - *TRS has reports that we use to track the information with established procedures to ensure we follow up on each instance.*
- Prior to go live in September 2017, was there any mention of RE submitting ED90's to terminate employees prior to go live? Our coach has mentioned our RE has a lot of these issues from that time period and suggested we go back and review these?
 - *Prior to go live REs were expected to submit an MD90 record to report the termination of eligible employees. This included termination from a TRS eligible position, retirement and death. This requirement has not changed since go live, but it has changed to include all employees. An ED90 record must be submitted to TRS regardless of the termination reason.*
 - *An open employment on the TRS system can cause reporting issues for you or other reporting employers if we do not receive the ED90 to report a termination.*
 - *The ED 90 must be submitted in the final month the employee will be reported to TRS.*
- Is there going to be a way to determine concurrent employment? If our RE has the same contract as another RE then we cannot tell.
 - *We recommend including a question in your hiring and onboarding process.*
 - *In addition, if View Employee Information has TRS eligible position as "yes" this is an indication that we have an eligible contract on file as of the day you look up the*

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employee. You can use this information to have additional conversations with the employee about employment they may hold at other TRS covered employers.

- *Kathy- Additional questions*
 - *CSV does not include full SSN because. This makes it difficult to reconcile because there is no unique employee identifier.*
 - *ED90- can TRS share a list with open employment, there is no way of us knowing what old records.*
 - *Mark- TRS could potentially to end those outstanding employments out there. We would need to set some parameters around that. Example, if we have participants with open employment, no transactions, no new positions for last 3 years. We could potentially run a database change request to close out those employments. Then follow up with EAG to check with suggested parameters. Don't want to unintentionally*
 - *Can TRS give us the TRS ID to load into our system like ERS has done? Assuming participant ID. Because the forms we receive have the PID.*
 - *Mark- We will need to get back to you, just like in the past we were not able to provide the XR numbers but what I'm hearing or have not allowed in the past,*
 - *Retiree- had an employee who filled out our form that they were not employed somewhere else but did in fact have concurrent employment. We have to go back and collect. When I went in to report the hours for the person, ER25*
 - *Tried to create and enter one record for each- received an error about overlapping employment.*
 - *ED45- trying to end a job/start a job- errors out all the time. Easier to end the job and then start a new ED40. Instead of end/add.*
- **Information from TRS**
 - TRS Staffing
 - RE Coaches
 - *Currently have 24 RE coaches on staff*
 - *7 in training, 17 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.*

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- *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.*
 - *Due to the age of some of the information, this can cause additional review and overrides for our employers and employees. We believe this will decrease as the team reaches the current reports and can review closer to when the exception occurred.*
- **Report Due Dates and Penalty Fee Grace Period**
 - *As a reminder the due dates for the Regular Payroll report is the 6th of the month following the report period and the due date for the Employment After Retirement report is the 10th of the month following the report period, except for August which is due on the 6th. The due date is for the reports and TEXNET deposits.*
 - *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 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.*
 - *While we currently have the one month grace period, it's not likely that the penalty fee grace period will be extended in FY 2024.*
 - *TRS will continue to closely monitor report completion data for Reporting Employers (REs) and system enhancements before making the final decision.*
 - *As an example, we recognize there were system validation processing delays on the due date for October 2022 RP and login/access issues during Year End. We believe we've addressed the issue but will continue to closely monitor the processing runs each month.*
 - *If the grace period is eliminated, it will be required that the reports be complete by the due date to avoid fees. This will be in effect beginning with the September 2023 reports.*
 - *Kathy- I could have been done by the due date, but waiting on overrides. Would I be penalized for this issue? Adding extra work for us if we have to submit a waiver for things out of our control.*
- **Penalty Interest**
 - *We are seeing an increase in penalty interest for two situations*

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- *Carrying over negative balance from prior months and the new TEXNET was applied to prior month, not current. Review the ledger balances each month after the report reaches complete. Submit the TEXNET or transfer if you see any negative balances, which indicate additional funds due to TRS.*
- *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*
- *Kathy- had to report hours and information for my retirees because I*
- 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?*
 - *Misty- Would like more in the Error Resolution Guide- add some scenarios/examples*
- 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.*
 - *This Fall we added a Membership Eligibility training and in the Spring we will add Employment After Retirement and Substitute Employment.*
 - *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 are published on the website*
 - *December 2022 Update Newsletter*
 - *RE Portal Training->RE Portal Virtual Training*
- Recent Fixes

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- 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

- We have two enhancements that will be added to the RE Portal 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.

SSN or TRS- Assigned Temp ID ⚙	Employee Name ⚙	Record Type Code ⚙	Error Code ⚙	Description
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- 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	1,337	99.18%	11
October 2022	1,302	96.59%	46
November 2022	860	63.80%	488

- Additional Discussion