Employer Advisory Group
Meeting Agenda & Minutes

Date: 6/14/2023
Start Time: 10:00 AM
End Time: 12:00 PM
Location: Microsoft Teams

Type of meeting:	Quarterly Meeting
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: members marked with "x" were not present at this meeting.

Dawn Cummings	ESC Region 3	Tammy Cunningham x	(ESC Region 8)
Geriann Neumann x	ESC Region 3	Mary Ramon	Northside ISD
Rachel Jimenez	Conroe ISD	Lynn Nicholson x	Mason ISD
Emily Youngblood x	Flour Bluff ISD	Christine Porter x Shennel Malone	Spring Branch ISD
Claudia Alba	Pflugerville ISD	Tera Harris	Spring Branch ISD
Toni Larson	Round Rock ISD	Mickey Smith	Crandall ISD
Greta Graham	Uplift ED	Lori Johnson	Hutto ISD
Nicole Dean x	Judson ISD	Sherry McGraw x	Sulphur Springs ISD
Lisa Roberts x	Judson ISD	Tiffany Yarbrough x	Sulphur Springs ISD
RL Richards x	Muleshoe ISD	Theresa Zlotopolski x Scarlet Mcelyea	Clint ISD
Becky Bunte x	TASBO	Jeffrey Coats	North East ISD
Tonya Davis x	TASBO	Ginger Gable	North East ISD
Lana Walls x	Ranger ISD	Kathy Henderson x	Aransas County ISD
Nancy Wiggins	Maypearl ISD	Natasha Morgan	Midland College
Alisia Pena x	Round Rock ISD	Jackie Thomas x	Amarillo ISD
Claudia Wilko x	Northside ISD	Judy Como x	Judson ISD
Annel Perez	South TX College	Bette Su Williams x	UT at Houston
Misty Sanders	Texas Tech	Kim Ray	UTMB Galveston
Karen McDade	TX A&M	Kathy Rice	Midwestern State
Betty Butler	Dallas Community	Ashley Penny x	University of North TX
Christine Okanla	ACC	Christian Hiner x Madeline Davila	TX State University
Roxanna Van De Graaf	UT System	Amanda Babcock x	University of TX
Debbie Dowdy x	Texas Tech Univ.	Kay Johnson x	Stephen F Austin Univ.
Brittany Heim x	San Jacinto College Dis.		

TEAM PROGRAM
TRS Enterprise Application Modernization

Microsoft Teams:	737-220-2496
Conference ID:	720 616 189#

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

- Intention of the EAG

  o *{Mark}- Created 2017 prior to the RE Portal launch. 1/2018 started having regular mtg to provide updates and welcome feedback from Res. Purpose of the meeting: gather feedback, encourage a collective voice for all employers in Texas. We try and get representation of all areas. Encourage EAG to reach out to peers to gather pains, and what's working for them, etc.*

  o *We have some new EAG members and want to remind the group what our original intention was for creating the EAG.*

- Questions / topics from EAG members (Katie)
  o *Wanted to see if we could ask a question of the holiday TRS observes versus the ones school districts observe. Example is Christmas: almost every district in TX takes a minimum of two weeks off and you guys only take 2-3 days so for the month of December we use up one of our warnings for not working enough hours. This also usually happens in November for Thanksgiving and again in March for Spring Break. This ends up exhausting our warnings for low hours so then when an employee has a bad month and gets sick and works low hours, we have overrides. Is it possible for you to visit the days you consider workdays for us based on most school calendars versus federal holidays? Some of the holidays you observe we do not and that also causes overages for those months. I know you can't catch them all but Christmas, Thanksgiving and Spring Break are pretty much the same across most districts.*
    ▪ *We understand this is a challenge for many REs. TRS currently accounts for a total of 11 Federal Holidays in our Verify Membership Eligibility validation messages. Since implementing this change last Spring, we have seen an improvement in the number of errors for our non-higher education employers. The specific holidays included can be found in the March 2022 Update Newsletter.*
    ▪ *With that being said, we recognize that we still have an opportunity for improvement with this validation. We have begun and will continue holding internal conversations about possible enhancements to these validations.*

- ▪ *This includes potentially separating the validation based on RE type. Higher Ed vs Non-Higher Ed.*
- ▪ *As enhancements are implemented, we will share the information with REs.*

- o Would it be possible to be notified when someone rescinds their TRS7 with you and we have already certified it? We had an employee that told us she was retiring, we submitted her TRS 7 and then she told you directly after her last work day with us that she didn't want to retire, just wanted to pull her money out. In our district we pay out extra things if you are retiring versus just quitting and pulling your money out of TRS. If we would have known she rescinded her retirement, we would not have paid out all her leave balances.
  - ▪ *TRS is not able to provide this information to the REs. This would need to be a conversation between employee and employer. We can recommend reviewing your current internal process for this situation. TRS is aware that some REs ask the member to provide the letter from TRS stating that the member is now on annuity payroll prior to paying out certain payments for retiring.*

- **Information from TRS**

  - Retirement and Death Certifications

    - ▪ *In April 2023 TRS replaced all previous iterations of the TRS 7 and TRS 8 forms with Retirement and Death Certifications in the RE Portal.*

    - ▪ *Enhancements made to the Retirement Certification*

      - *Replaced has the employee terminated with was the Last Position Eligible for TRS?*

      - *Removed Semester Dates*

      - *Added retirement date to the certification screen*

      - *Added a note field for REs to use (Save Notes only saves the notes)*

      - *Issued on or after the member's retirement date {application must be received and processed, and retirement date met or passed}*

    - ▪ *Enhancements planned*

      - *Add an FRM field for eligible and ineligible employees to the Retirement Certification- this will allow TRS to know when it is appropriate to close the account and not require a change to the ED90. We will clearly label the fields for REs.*

      - *Download option for the completed certification and considering a workflow option*

- *Date Sent – Currently following prior code when certifications were sent 15 days prior to the retirement date. Logged and will fix to reflect date the certification is actually sent to the RE.*

- *(Claudia) – receiving errors for employees resigned 2018 and 2020. Questions- forward to Katie.*

- *(Kim Ray)- employee showed up on retirement list on portal, from 1989 May be a transition acct that coaches need to remove.   Send to Katie.*

- *(Katy Rice)- Retirement cert. had trouble with software, since resolved. But, had another issue recently. Issue could have been a result of timing.*

- *Betty Butler- employee did not retire, she said it was a TRS error. How can we remove this? (email coach and Katie- name of the employee and confirm that the employee has not retired).*

- *(Mary) Will there ever be an option to just say NO the person is still employed and it will remove the TRS7, kind of like with the TRS6? Still exploring options for this.*

- *Claudia- concern is communication w/employees that TRS is waiting on district and visa versa regarding receiving TRS 7.*

- *(Lorinda) I had a retiree come to my office that was told by a Justin at TRS that she needed to get a TRS 7 completed from every district that she worked at. She worked at another district AFTER ours, but was coming to get me to submit the TRS7. I told her to call TRS again & talk to someone else as I did not think that was correct.*

- Chat

  - *Added chat for quick support requests. Chat <u>cannot</u> include PII and will be converted to a call or email if we receive a chat with PII.*

  - *Chat is available the 11th through the end of each calendar month. 9-12 and 1-4 each business day. Not available the 1-10 of the month.*

  - *There are automated options available 1-10th.*

- Co-Browse

  - *A functionality that allows REs to share their RE portal screen with an RE coach. Cannot see any other screens or browser screens outside of the RE portal.*

  - *We have created user guides for the certifications, chat, and co-browse features. The guides are located on the [RE Portal Training](#) page of our website.*

- TRS Staffing

- *Excited to announce that all 23 RE coaches have been assigned their own compliment of REs. Each coach now has an average of 59 REs.*

- *With the improved RE to coach ratio, we expect to see an improvement in response times.*

- *Which leads us to the next topic of the RE Survey*

- RE Survey

  - *We received the results from the RE survey, thank you for your participation and feedback. The results of the RE Survey will be shared in the July Board Meeting and communication from TRS summarizing the results will be sent out no later August.*

  - *However, we will share that one of the most significant concerns from REs is still response time.*

  - *Now that we have all the RE coaches assigned a compliment of employers, we are moving toward our goal of reducing response time from within 2 business days to 1 within one business day for most support requests. This goal is for most requests that we receive from REs.*

  - *It is important to note that there are some support requests that may take longer than one business day. To ensure that our REs have a good understanding of our abilities, we will be creating a Service Level agreement with our REs, to help provide a timeline for each of our primary services. Such as emails, phone calls, writing up and processing overrides, ORP review and entry, support from other TRS departments etc.*

  - *One area that we would love feedback on, while we evaluate our next goals is determining what is preferred by REs:*

    - *Having a contact center model, where an RE calls or emails into a general line and any coach can respond.*

    - *Or having an assigned RE coach familiar with your RE's processes and situations?*

    - *Advantages/Dis-advantages of these models? Mary- appreciates that her coach recognizes that she has a large district. Kathy- Individual coaches are an asset to the district, but maybe having someone else handle simpler overrides or questions, etc.*

  - *Another area we would like feedback on is the possibility of a scheduling system for report assistance and/or training?*

    - *REs would be able to "register" for certain dates and times with an RE coach to train on their TRS errors.*

- Penalty Fee Grace Period

  - *In March 2023, TRS emailed all Reporting Employers regarding the FY 2024 grace period. As a reminder, TRS has issued a final extension to the one-month grace period through the August 2024 report period. This decision was made after careful consideration of feedback from REs regarding the challenges you all continue to face related to TRS reporting.*

  - *The grace period does not change the due date for reports and TEXNET deposits. Instead, it allows your teams extra time to complete reports before penalty fees are assessed. REs are still urged to submit and complete reports by the due date set forth in the Texas Government code. Information about the due dates can be found on the TRS website. The FY 2024 schedule will be added to the website closer to the beginning of the new year.*

  - *In preparation of the grace period ending with the September 2024 report period, TRS recommends REs create an action plan now to begin completing reports as close to the TEXNET and report due dates as possible. This may involve reviewing and updating your RE's current payroll and/or report processes.*

  - *Encourage all REs to read the Update Newsletters each month. Beginning with the June Update Newsletter we will be providing tips to help your warning and error review.*

- Contribution Rate Increases

Contribution Type	Current Rates	Rates Effective 09/01/2023
Member Contribution	8.0%	8.25%
State Contribution	8.0%	8.25%
Public Education Employer	1.8%	1.9%
Pension Surcharge	16.0%	16.5%

  - [Contribution Rate Increases Passed in 2019 Texas Legislative Session](#)

  - *Please keep in mind the new rates will apply to all TRS-eligible compensation paid on or after Sept. 1, 2023, and the rate increase will affect your RP and ER reports.*

- Validation Error Message

  - *Thank you to each of the members that reviewed and provided feedback on our project to update the validation Error Messages. With your help, we will be updating 86 error messages later this year.*

- TRS RE Trainings

  - *For FY24, there will be an overhaul to the RE Training schedule and training opportunities.*

- *First are eLearning options. We have hired eLearning specialists to help develop self-paced, interactive trainings that will be available on the website.*

- *Second, we will be minimizing the time commitment to each RE training session with the implementation of Topic Based sessions, rather than full day trainings.*

- *Third, there will be more in person training opportunities.*

  - *This includes at TRS, at ESCs and onsite visits to RE campuses.*

  - *As a reminder that upon request our RE Coaches available to travel to your campuses or you are welcome to come to TRS for training. We recognize that travel can be challenging so we can also utilize Co-Browse to assist with error resolution training.*

- *Summer 2023 Trainings – In Person*

  - *TRS will hold half-day workshops in all 20 regions this summer, from mid-July through August. These workshops will cover common reporting issues that reporting employers are encountering. All workshops will take place from 9 a.m.- noon at each location. Each attendee must register separately since we are limited in the total number of seats per location. Please visit our RE Portal Training page to register.*

- Recent Fixes

  - *In April our area of focus was implementing Chat, Co-Browse and the new Certifications.*

  - *Since the implementation we have resolved some initial defects with the certification as well as completing the enhancements we spoke about earlier.*

  - *One defect, unrelated to the certification, was an issue some non-Higher education REs were encountering Performance Pay.*

- Scheduled fixes

  - *The next maintenance cycle is currently scheduled for June 25, 2023. In this MC, the following defects are scheduled to be fixed:*

    - *Substitute Refund Certification*

    - *Validation 612 "A position record already exists for this retiree. A retiree can only have one ER record per report period." Some REs are receiving this error on the ER25 record incorrectly.*

- **RE Report Status**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
April 2023	1,346	99.70%	4
May 2023	1,136	84.15%	214

- **Additional Discussion**

  - *We've had several calls directly to me over the last month from those who are requesting a refund. The problem is that TRS customer service is telling them that we can send a file with just their final information on it so they can get their refund earlier. They get very upset with me when I tell them we cannot do this. Can someone please mention this to TRS CS?*

    - This same is impacting several employers.   Advised to send employee names to review specific files.

  - *Is it possible for TRS to set the expectation on how long it will take for the refund to process. I know on the TRS refund pamphlet it says it can take up to 60 days for it to be processed.*

  - *I think this can apply to newly-retired members, too. It's the same scenario--they receive their last pay in the month after they retire, and then it's another month before TRS receives their final report. Just asking that question, "when was your last pay issued?" will resolve this and set reasonable expectations.*

  - *Do not see 23-24 Contribution Rates on the Reporting Employers screen.*

    - *They will be posted closer to the end of FY.*

https://www.trs.texas.gov/Pages/re_chart_contribution_rate_increase_2019.aspx

  - *How will coaches manage workload on heavier months with more overrides ? The convo with the 2 models earlier, should be able to help with the workload.   Mark and Katie are exploring different options for staff shifting to help.*