



Employer Advisory Group Meeting Agenda & Minutes

Date: 04/23/2021
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, Melody Austin, Katie Tucker, Molly Grosskopf, Carol Casey, Ashley Conrad, Chris Cutler, Nicholas Gonzalez, Andrea Morales, Jessica Palvino, Sarah Valenti, Meera Krishnan, Kevin Wakley, Caitlin Kennedy, Caterina Saucedo, Nathan Farmer

EAG Members and designated participants:

Kathy Rice (MWSU)	Andrew Charpentier (UTMB)
Miguel Castellanos (UTH TMC)	Ashley Penny (UNT System)
Betty Su Williams (UTH TMC)	Betty Butler (DCCCD)
Christine Okanla (ACC)	Diana Salami (Tx State)
Karen McDade (TAMU)	Kathy Rice (MSU Texas)
Kimberly S. Ray (UTMB)	Chris Boydston (UNT)
Annel V. Perez Zuniga (South Texas College)	
Sandy McAfee	
Scott Deck	

Other Attendees:

Microsoft Teams: 737-220-2496
Conference ID: 819 454 769#

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
 - No questions received from EAG members.
- Defects fixed recently

Several defects have been fixed since last time we met. These fixes were implemented at the end of February 2021.

- **Download All CSV feature (on the report screen)**- *there was a defect that prevented REs from using this feature. The defect was fixed so REs can use the download all CSV feature again. All ED or All RPA/ERA reports.*
- **Pop-Up Message when they click "Save" and "Return"**- *One of the most requested fixes from REs has been completed. When click "save" and "return" within a record, you will no longer see the pop-up message stating that the changes weren't saved. You will now receive a message that the information has been saved.*
- **Validation 803 became an error on 2/28**- *initially there was a defect with the validation which caused the error to populate for some REs incorrectly. The defect was fixed on Monday, 3/15.*
 - *If you receive this error, navigate to the View RE Ledger screen and check to see if you have any negative balances in each of the contribution accounts. When you navigate to RE Ledger, change the contribution type from ALL and go through each contribution types that you are required to submit. This includes any Penalty Interest and Penalty Fee accounts; these accounts must also be in a positive status. A negative balance in any account, including interest and fees, must be resolved before you can complete the report.*
 - *We do have one scenario that this error is still populating unexpectedly. You will receive this error if you have a waiver request for Penalty Interest or Penalty Fees that was approved and waived that amount. An issue that is causing it to still populate on the reports even when you navigate to the interest accounts or fee accounts and those balances are at zero balance. This situation is a known defect and we will override this error. Please reach out to your coach who will double check all accounts are in a positive status and then they will submit the override request for you. This final defect is scheduled to be fixed this summer.*
 - *Another scenario we will consider overriding, is if you have a pending Waiver Request that has been submitted and is under review. While we are reviewing the request, we will go ahead and process an override. The waiver request will already need to be provided to your coach to move forward.*
- **Update to the deleted records verification within the RE Portal**- *Previously when you deleted a record from your report, it was required that your coach follow-up and ask the reason the record was removed from the report. With this new verification in the portal it*

TEAM PROGRAM

TRS Enterprise Application Modernization



now allows when a record is deleted from an ER or RP report within the portal, a deletion reason must be selected at the time of deletion. Then before the signature can be accepted for the report, the verification for all the deleted records must be completed.

- *You can find the deleted records verification under "my worklist"*
- *Required before signature- if the verification is not completed before the signature, RE will receive an error on the signature page.*
- *Notes field limited to "other" reason- previously notes could be added for all the deletion reasons. Now notes are limited to the "Other" reason so the RE can briefly describe the reason for deletion. Please use "Other" if none of the other reasons given apply.*
- *Email notification to RE- email when the RE has deleted records need to be verified in the portal. This email will come at the same time as the Signature is ready for review email.*
- *The process when records are deleted in the RE portal will be:*
 - *When a record is deleted from a report, complete the reason for deletion*
 - *Once all records are valid, complete the deleted records verification (my worklist)*
 - *Complete the signature page*
- *Web administrator able to complete verification- defect initially prevented the Web Administrator from being able to access and submit the verification. Now user with Signature and Administration can submit the verification.*
- *Coach may still follow up with RE on deleted record for more information or to advise if additional steps/corrections need to be made.*
- **Outstanding interest and fees banner added back to RE Portal-** *When you first log in it will take you to the home page and at the top of the screen. If you have an outstanding Penalty Interest or Penalty Fees it will list those in a red box labeled as an error. Back to the same defect for the waiver process that causes 803 to kick an error also impacts this banner at the top of the portal. When you log in and you have had interest and fees waived it may display the balances may be incorrect for some REs. The balances on the RE Ledger screen are correct. If you see a balance due on the home screen banner, but nothing is showing due in the RE Ledger, rely on the RE Ledger.*
 - *This defect should be resolved this summer.*
- *No comments regarding defect/enhancement.*
- **Information from TRS**
 - **EAR Rule Suspensions under COVID-19 disaster declaration**

TEAM PROGRAM

TRS Enterprise Application Modernization



- *In the Spring of 2020, the Texas Governor, Greg Abbott, suspended certain EAR statutes and rules that may hinder or delay hospitals and health care facilities in responding to the COVID-19 crisis.*
- *This primarily impacted High ED employers who have medical campuses responding to the Covid-19 crisis. It allowed retirees to come in and help without being assessed a surcharge.*
- *As a reminder, this suspension is in effect until terminated by the Office of the Governor or until the disaster declaration is lifted or expires. Each month the Governor has extended the Disaster Declaration. The Disaster Declaration has been extended for April 2021. Normally Disaster Declaration decision occurs within the first week of the calendar month.*
- *Once lifted, those REs operating under this suspension will be required to report Surcharges.*

Note: we do not have a timeline but be mindful that it can be lifted at any time.

- **Penalty fee grace period**

- *TRS's executive leadership team has made the difficult decision to eliminate the grace period for report penalty fees effective with the September 2021 report period.*
- *Currently we have 68% of REs completing RP on the due date and 81.8% of REs completing RP within 5 business days of the due date.*
- *The decision allows TRS to meet the requirements outlined in Texas Government Code Sec. 825.408 and TRS Rule §25.28(j); which do not have a grace period*
- *Over the past four fiscal years, TRS has resolved over 1,600 defects and made over 200 enhancements to the RE Portal. All of which allow REs to complete their reports timely.*
- *This is a partnership between the employer and TRS, particularly your RE Coach.*
 - *Sandy- What is the due date of the September reports?*
 - *KT: The September 2021 Regular Payroll Report will be due October 6, 2021 and the Employment After Retirement report will be due October 10th. The August reports will be due September 3, 2021. This is for RP & ER reports.*
 - *Sandy- Penalty Fee that will be required does not affect the August report? Even though there are earlier deadlines for August.*
 - *KT: Correct. It will be with the Sept 2021 report period and the standard one-month grace period is technically in place for August, but annually have the year-end close process and we push to have reports completed generally by*

TEAM PROGRAM

TRS Enterprise Application Modernization



Sept 15th to prepare for the annual statements. TRS annual year end deadlines will be sent out soon.

- **Contribution collections for higher-ed employers**
 - *Through this fiscal year we have been working with employers to collect outstanding contributions, fees and interest.*
 - *Over the next few months, we will be focusing on our higher education employers to address any remaining outstanding contributions, fees and interest.*
 - *This will include setting deadlines for completing reporting corrections and addressing any outstanding waiver requests.*
 - *This project throughout the fiscal year is part of a larger project which we will work with employers as we get close to the end of fiscal year that all is paid in full- to start the new fiscal year "at clean slate If we have any employers who are not able to fulfill the contributions, interest and fees, we do have a statute that we are required to notify the Texas Comptroller's office. We want to focus on getting balances at a current status.*
- **Scheduled fixes**
 - *The next employer maintenance and enhancements are scheduled for June.*
 - *Fix remaining defect for validation 803- REs with an approved waiver and the interest and/or fees were waived are still experiencing validation 803 in errors.*
 - *Error message on organization home page- the balances displayed in the error for Interest and/or Fees may be incorrect.*
 - *Totals Page missing EG RE Ledger balance- will be fixed and display the current RE Ledger balance*
 - *EG local is still displaying accurately on the RE ledger but not displaying on the total page.*
- **RE Report Status (Katie to complete AM of meeting)**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
February 2021	1337 RP 1338 ER	98.95 %	2 RP 1-ER
March 2021	1123 RP 1247 ER	91.34 %	116 RP 92 ER

TEAM PROGRAM

TRS Enterprise Application Modernization



- Additional Discussion
 - Summer Training Schedule will be published in May Update Newsletter. Will include Intro to TRS, RE Ledger training, HR training and legislation training.
 - All welcome- please register separately – links will be available on TRS website under Reporting Employers-> RE Portal Training-> [RE Portal Virtual Training and Registration](#)
 - Open it up for Questions from Employers:
 - Chris Boydston- Are other higher ed employers struggling to get reports in by the 6th of each month?
 - KT- We have all employer types that fall within the different groups that we track for report completion. We do have higher ED employers that are able to complete by the 6th of the month. The next group we monitor get their report complete within 5 business days and the final group is between 6 business days and the end of the calendar month. There are all RE types that fall into each group. We have almost 70% that complete by the due date and about 10% within 5 days of the due date and the remainder of the 20% are between the 6th and the end of the month.
- Meeting ended at 11:04 am