



Employer Advisory Group Meeting Agenda & Minutes

Date: 01/20/2022
Start Time: 10:00 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, Chris Cutler, Nicholas Gonzalez, Andrea Morales, Meera Krishnan, Kevin Wakley, Caitlin Kennedy, Catarina Saucedo, Nathan Farmer, Jennifer Almanza, Carol Casey, Teresa Menchaca

EAG Members and designated participants:

Ashley Penny (UNT)	Betty Su Williams (UT Houston)
Betty Butler (DCCCD)	Christine Okanla (ACC)
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)
Greta Graham (Uplift Education)	Becky Bunte (TASBO)
Dawn Cummings (ESC Region 3)	Tammy Cunningham (ESC Region 8)
Becky Davis (Conroe ISD)	Cathy Felts (Mason ISD)
Claudia Alba (Pflugerville ISD)	Emily Youngblood (Flour Bluff ISD)
Jackie Thomas (Amarillo ISD)	Jeffrey Coats (North East ISD)
Lana Walls (Ranger ISD)	Lori Ganci (Northside ISD)
Lori Johnson (Hutto ISD)	Mickey Smith (Malakoff ISD)
Nancy Wiggins (Maypearl ISD)	Nicole Dean (Judson ISD)
RL Richards (Muleshoe ISD)	Tera Harris (Spring Branch ISD)
Theresa Zlotopolski (Clint ISD)	Tonya Davis (Round Rock ISD)
Sherry McGraw (Sulphur ISD)	Geriann Neuman (ESC Region 3)
Christian Hiner (Texas State)	Andrew Carpenter

Other Attendees:

Microsoft Teams: 737-220-2496

Conference ID: 644130008#

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**
 - **Full-time employee also working as a substitute**
 - If an employee works as a full-time employee, and also works as a substitute, is the substitute pay TRS eligible?
 - *Yes, since the employee has established eligibility in the full-time position at your RE the substitute position at your RE is considered additional duties.*
 - *As additional duties, the substitute position is no longer a true substitute and is eligible for TRS and the substitute pay is also eligible for TRS*
 - *On the ED 40, the employment type of the "substitute" position will be less than half time and TRS eligible if a different position code than the Full-Time position.*
 - Do the days worked as a substitute count toward the 90 days if TRS is deducted?
 - *Yes, time worked in the additional duty role is counted towards the 90 days for TRS service credit.*
 - What happens if the employee resigns from the full-time position and continues to work as a substitute? With 90 days? With less than 90 days?
 - *If the employee resigns from the eligible position, and only continues to work as a substitute, then the employee is not eligible for TRS from that point forward regardless of whether the employee earned a year of service.*
 - *You would need to submit an ED45 to end any open eligible positions and begin a TRS eligible "no", substitute employment type.*
 - **415, 636 error code**
 - Is there any progress toward reducing the number of overrides needed each month? We have 59 overrides pending for December.
 - *TRS is completing a review of all validations and currently have a target for potential changes/updates in the Fall of 2022.*
 - *When we make validation changes, it can result in an exception report because we need to make sure we have the correct data,*
 - *We see positives and negatives for both options so would like your feedback:*
 - *Would you rather the error populates up front and address it at that time? Or for the coach reach out after the fact to get clarification and have possible corrections needed?*
 - *Becky- goal is to keep from the waiting time for the overrides.*
 - *Katie Tucker- Is there a preference about what to do, exception report or validation changes?*

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- *Kathy Rice- I like to see errors up front so they can be corrected instead of having to go back. Karen McDade- Errors upfront. Lori Gancy- errors up front.*
- *Becky Davis- is there a way we can use a drop down to certify the reason why something is showing up? Can it be resolved instead of going through a 3rd person?*
 - *Katie Tucker said TRS would explore that option. There still may be scenarios where we need to follow up with the RE. An override must clearly explain why we are bypassing something that we put into our system so we would need to make sure this meets expectations of auditors.*

636 *Eligible TRS Gross Compensation and member contributions must be reported if the employee was paid TRS-eligible compensation during the report period. If you feel the reported information related to this error is correct, please contact TRS.*

415 *Eligible TRS Gross Compensation must be reported for full time employment. If you feel the reported information related to this error is correct, please contact TRS.*

○ **Substitute position codes**

- Are there any plans to add position codes for substitutes to assist with ED reporting?
 - *We do not have plans currently to add position codes for substitutes. This would require a rebuild of the validations since most are built on employment type code and not position code.*
 - *If a substitute works in several different positions, then you only report the position code as the primary position the substitute is expected to fill in for.*

○ **Full-time employee (02 position) going to substitute (02) in December with TRS wages in January and February. The employee worked as a substitute one day in December, in January and in February.**

- Can you give an example of the ED/RP records needed for Dec., Jan., Feb.? We recently had a similar situation and struggled having the TRS eligible wages process correctly due to the TRS flag and the days reported.
 - *December- Submit an ED 45 to end the Full-Time position and begin the Substitute Position. The RP 20 should only have time worked in the TRS eligible position.*
 - *January and February- report time worked as a substitute. If the employee receives any accrued pay from the eligible position in either of these months, an override will be needed. Please provide your RE coach a brief explanation that the compensation was earned in the eligible position that ended in December.*
 - *Kathy Rice- would an exception report create more penalty and interest as well?*

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- *Mark- Possibly if the corrections are for member contributions. For employer contributions, you have a period to make those corrections and submit a TEXNET (if needed) to avoid penalty and interest.*
- *Lori Ganci- when we send overrides, there is a delay in the 1st response and then further delay if more information is needed.*
 - *TRS will continue to review this feedback and see how we can provide support/responses as quickly as possible.*
- *Becky- recently had coaches that drive a bus, and it is not wholly separate, confused on how to report the statutory minimum contribution b/c the 04 does not have a minimum salary. When we have 04 position but a teacher/coach, they have 02 and 04; how do we report it? Are we going to have overrides on all of those?*
 - *KT: When it is not a wholly separate position, then all the information is reported on one record. In this example, all the compensation would be reported under the 02-teacher position.*
 - *You would only need to report an 02 and 04 if the bus driver position was wholly separate. Example, a teacher that drives a morning bus route.*

<https://www.trs.texas.gov/TRS%20Documents/re-portal-error-resolution-guide.pdf>

- **Information from TRS**

- **Staff Shortages at TRS**

In recent months, the Reporting Employer (RE) coach staff has experienced an increase in turnover. This has impacted the coach to RE ratio.

Currently we have 11 RE coaches with an average of 122 REs per coach. Our goal is to have 50-75 REs per coach.

We are working to fill our vacant positions and training new staff members as quickly as possible. As new staff members are released from training, the ratio of coaches to REs will be reduced which will help improve our service.

We want to reassure you we are working diligently to provide the best support possible in a timely manner. We ask for your continued patience with any transitions we might face in the coming months.

How this may impact your RE:

- *You may be notified that a new RE coach has been assigned*
 - *Your RE coach is listed in the RE portal*
- *Slower response times*
 - *Our current response times are within two business days*

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- *Due to the increased coach to RE ratio, response time may be longer than what you have experienced in the past.*

If the service level of the RE coach causes your RE to accrue penalty fees, a waiver will be considered. However, we ask that you account for the current response time when requesting support and do your best to complete the reports on the original due date rather than the penalty fee grace period deadline.

- **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](#)*
- *TRS will continue to monitor report completion progress, feedback from REs and RE coaches when determining what the PF grace period for FY 2023 will be.*

- **Employer Toolkit**

- *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.*

- **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 Goide](#) at PPRI.*
- *To be sent beginning the week of January 31*

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- **Upcoming TRS Trainings**

- *Spring 2022 Trainings have been published*
 - *RE Portal Training->[RE Portal Virtual Training](#)*

- **Defects fixed recently**

- *EAR Certifications*
 - *Added Employment type to Actual Dates Worked Certification*
- *818 validation - Refund exists after the Employment Start Date. This was corrected in December.*
- *RE Coach information will be updated*
 - *We have some REs that shows Reporting@trs.texas.gov as the coach in the RE Portal. This is a defect and is scheduled to be fixed in February 2022.*
 - *You should have been notified who your new RE coach is, but if you do not have their contact information, you may email the reporting@trs.texas.gov address and we will route it to the correct coach.*

- **Scheduled fixes**

- *Update to Verify Membership Eligibility to consider Federal Holidays*
 - *We are updating the Verify Membership Eligibility validation to consider certain Federal Holidays in the calculation. While this won't eliminate the need for overrides, we do think it will reduce the number of overrides for these errors.*
- *Update to IRS Salary Cap Limit for FY 2022*
 - *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.*

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- **RE Report Status**

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
September 2021	1,343	99.85%	2
October 2021	1,336	99.40%	8
November 2021	1,328	98.81%	16
December 2021	1,122	83.48%	222

- **Additional Discussion**

Kathy Felts- one of our employees has been called to active duty, he not resigning. He will run out of leave. We have an interim coming in for his position, is that pos a true sub?

Katie Tucker- as long as the employee on military duty is still the employee of record, then the retiree coming in can be a sub as long as needed.

Christian- penalty waivers. Who do we have to ask that from? Do we pay the fee first? How is this going to work.

Katie Tucker: Waiver can be emailed to Katie or your RE coach. Do not pay the fees while pending review. You might receive an 803 while in review. If that's the case, contact your RE coach to override.

For View Employee Information:

Is it possible for employee that is concurrent to have an effective date as to when they're concurrent? Can we have an identifier that indicates when they are concurrent?

Christian, when we go back to make them ineligible, we can an error saying they are concurrent. Do we have to do this every month?

Amanda Babcock- if p/t is ineligible but now eligible. Our date is 8/31 will that date update?

Christian- can we have concurrent indicator on that line?

On TRS portal- how can you tell if employee is working for another entity.

REs recommended TRS show the eligible contracts posted for the entire fiscal year, not just based on the date that employee info is reviewed.

Katie Tucker showed the [Active Employees View Employee Information Screens](#) reference material as example on how to see potential concurrent eligible employment now.

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Katie Tucker- TRS will need to have more discussion internally, and looking at validations, before answering if the concurrent employment information can be updated on View Employee Information.

SSA1945:

Lori Johnson- forms SSA 1945- does TRS still want them mailed.

Katie Tucker- yes, the form indicates they need to be mailed in.

Lori: mailing the forms with SS #'s on the form is a concern.

Mark Chi will look into this.

Claudia- can that form be emailed?

Mark Chi TRS requires it mailed but will look into the possibility of allowing it to be emailed.

TRS 8:

Kathy- employee passed away. Form couldn't be completed until the employee was paid but continued to receive notices from TRS to complete the form.

Mark Chi: Please send me an email with the information so I can review the account for you.

TRS 7:

Lori- a lot of TRS 7s are done in her office. Concern with the processing time of TRS 7s.

Mark Chi: Can complete and mail in the hard copy of the TRS7 or complete the electronic form in the RE Portal. Electronic submission does not mean that we will be able to process the form any quicker, but you will know the form was received by TRS and not be impacted by any potential USPS mail delays.

Meeting ended at 11:25pm