



Reporting Employer Satisfaction Survey

2023 Report

Table of Contents

| | |
|---|----|
| Executive Summary..... | 1 |
| 1 Methodology..... | 3 |
| 1.1 Data Collection..... | 3 |
| 1.2 Quality Review | 4 |
| 2 Survey Results | 6 |
| 2.1 Overall Quality | 6 |
| 2.2 Changes to TRS Services..... | 7 |
| 2.2a Improve Response Times | 8 |
| 2.2b Extend Reporting Deadlines..... | 9 |
| 2.2c Improve the RE Portal | 9 |
| 2.2d Provide Training | 10 |
| 2.2e Provide Different Ways to Contact | 11 |
| 2.3 Contact with Reporting Employer Coach..... | 12 |
| 2.4 Rating of Reporting Employer Coach by Dimension of Service | 17 |
| 2.5 Rating of the Importance of Services Provided by Reporting Employer Coaches | 19 |
| 2.6 Intended Use of Online Chat..... | 20 |
| 2.7 Ranking of TRS Services..... | 21 |
| 2.8 Standard Reporting Employer Coach Response Time | 22 |
| 2.9 Reported Reporting Employer Coach Response Time | 24 |
| 2.10 Training Attendance..... | 25 |
| 2.11 Training Effectiveness | 27 |
| 2.12 Evaluations of TRS Resources | 29 |
| 2.13 Preference for Receiving Training Materials..... | 31 |
| 2.14 Ratings for TRS Communications and the Reporting Employer Portal..... | 32 |
| 2.15 Awareness, Use, and Evaluations of the Employer Toolkit | 35 |
| 2.16 Open-Ended Comments..... | 37 |
| 2.16a Improve Response Times | 38 |
| 2.16b Improve Response (Availability) | 38 |
| 2.16c Extend Deadlines..... | 38 |
| 2.16d Improve Communication | 39 |
| 2.16e Provide Training | 39 |
| 2.16f Improve Report Process - Deadlines & Penalty Fees..... | 41 |
| 2.16g Improve Website/Software Navigation & Function..... | 41 |
| 2.16h Improve Communication/Availability/ Response Time from Coaches..... | 42 |
| 2.16i Improve Report Process - Procedure | 42 |
| Appendix A – TRS Reporting Employer Satisfaction Survey 2023..... | 43 |
| About Elite Research, LLC | 65 |

Executive Summary

The Teacher Retirement System (TRS) Reporting Employer Satisfaction Survey (RESS) is designed to provide critical feedback to the Teacher Retirement System of Texas on the services provided to Reporting Employers (REs). Each year, REs are provided with the opportunity to evaluate TRS services and give feedback on how the Reporting Employer Portal (RE Portal), their interactions with TRS Reporting Employer Coaches (RE Coaches), and overall TRS system are functioning from the perspective of REs. This information is used to improve the services TRS provides to REs.

In this year's survey, the initial population of contacts provided by TRS included 1,348 REs. Because the same individual can represent multiple REs, as well as some RE's have multiple contacts, the population included 2,158 unique email addresses. Thirty-seven of these email addresses bounced, ten were not delivered, and eight contacts unsubscribed, leaving 1,293 REs with at least one valid email addresses and 2,103 individual contacts. Of the 55 contacts that were not delivered or unsubscribed, four were corrected and fourteen pointed us to the current contact for the RE. For emails that bounced or were not delivered due to an invalid email address, as well as for individuals who did not respond, the individual was called up to four times to get an updated email or new contact, or to ask to complete the survey in an effort to improve response rates.

The final results from 2023 were based on 904 individual respondents representing 893 REs. For comparison, the final results from 2022 were based on 766 individual respondents representing 845 REs. Overall, the response rate to the survey of represented REs increased from 63% in 2022 to 66% in 2023. This can be interpreted to mean that 66% of REs with at least one contact with a valid email address completed the survey. Major findings from the survey are presented below.

Increase in Ratings of TRS Services: In the 2023 survey, ratings for overall TRS services increased, indicating more satisfaction with the services provided. Nearly one-third of respondents (30%) rated the quality of TRS services as "excellent" while the majority rated the quality of TRS services as "good". These are the highest services rating since before 2021. The majority of respondents are satisfied with their experience with the agency (58%), and approximately one-quarter of respondents are very satisfied (24%).

Contact with Reporting Employer Coaches: Roughly three-fourths (73%) of respondents report rarely or never contacting their coach. These levels are relatively consistent with previous years. Higher education institutions continue to contact their RE Coaches much more frequently than public schools with 70% of higher education REs contacting their RE Coaches occasionally or more frequently whereas only 23% of public school REs contacting their RE Coaches at the same frequency. Higher education institutions represent only 8% of the sample.

Continued Decline in Perceived Reasonableness of Two-Day Time Period: There was a continued decrease in the perceived reasonableness of a two-day response window. Approximately half of the respondents (52%) indicated this was reasonable compared to nearly two-thirds of respondents (64%) who found it reasonable in 2021 (58%). The majority of respondents reported receiving responses within 24 hours, an increase from last year, but still below 2021 levels when 58% reported responses within 24-hours. As indicated in the open-ended responses, response times become particularly important as reporting deadlines are approaching and REs face penalties for failing to meet those deadlines.

Reporting Employer Coaches: Ratings for RE Coaches continue to be overwhelmingly positive. There were more questions added in an effort to capture different dimensions of RE Coach responsibilities, but

responses were highly correlated meaning individuals who appreciate their RE Coaches tend to project the satisfaction and quality across all areas of character and responsibility. The majority of REs were very satisfied with nearly all dimensions of service (email communication, error correction steps, understands and responds appropriately to questions, direction to website resources, and service standard response time). RE Coaches are generally perceived as allies helping REs as they navigate the RE Portal. REs continue to report there are not enough RE Coaches and RE Coaches are unable to respond quickly to phone calls and emails. They attribute this lack of availability to TRS and not to their individual RE Coaches, stating that RE Coaches are overworked and need more training.

Support for Online Chat Continues to Increase: Support for an online chat function has been strong across surveys, particularly since COVID. Only 2% indicated they would not use online chat at all, and the majority indicated a willingness to use chat frequently (37%) or all the time (25%).

Attendance at Training Remains Low: Training attendance continues to decline post-COVID. Prior to 2020 approximately 70% of REs attended some form of training and in 2023 those attending trainings in the past year were in the minority (49%).

Trainings and Materials are Just Ok: Of those who did attend the trainings, the majority (at least 85% for each workshop topic) found it useful to extremely useful (with useful being at least 50%). Open-ended comments heavily focused on the need for more training (in-person and online), as well as captioning for recordings. Similarly, the majority of respondents found resources “helpful” (52%) and “very helpful” (26%) rather than extremely helpful (8%). TRS emails, the *Update* Newsletter, and the Payroll Manual garner the highest use from respondents.

Awareness and Use of the Employer Toolkit: REs remain largely unaware of the new Employer Toolkit with even reduced awareness from 2022. Of those who are aware, only a handful of REs have actually used it. More than one-third of those using the Employer Toolkit rated it very helpful or higher. No one rated it not helpful. REs generally learned about the Employer Toolkit from the *Update* Newsletter (42%).

Areas for Improvement: The 2023 satisfaction for overall quality was more positive than previous yearly reports. Overall quality, experience, and RE Coach ratings have increased since last year suggesting positive responses to changes designed to address last year’s findings. Overall ratings fluctuate between good and excellent, suggesting strong satisfaction levels, even if the intensity of satisfaction is not always at the extreme levels. There are fewer REs attending trainings, and those attending find the trainings helpful, with moderate satisfaction in the materials. The frustrations with response times during reporting deadlines continue. Suggestions for improvement follow from this assessment. First, REs note the need to increase response times, especially when they are confronted with pressing deadlines. Second, REs note the need for better communication from TRS, specifically on steps to correct errors and phone availability, and for better understanding of the challenges confronting REs. Additional recommendations include,

- Email and newsletter are well received, most other communication is not
- Increase phone availability
- Trainings are helpful, but not well attended. Improve training content and attract more attendance.
- Increase awareness of the Employer Toolkit
- Implement web chat or other real-time communication
- Maintain high satisfaction while increasing communication availability
- Explore differences and possible recommendations unique to higher education and public schools

- Push for opportunities to go from good to great

1 Methodology

The TRS RESS was designed by TRS and conducted by Elite Research. The online survey was programmed using Alchemer, a state-of-the-art survey research platform that tracks data collection and provides real-time updates regarding completed surveys.

The survey methodology for the 2023 survey was similar to previous surveys, however scales were reversed to go from negative to positive and additional survey items were added to align the survey to other agency reporting requirements and to separate an item representing multiple factors. Similar to prior years, TRS provided multiple email contacts, in an effort to increase survey response. TRS provided multiple contacts for each RE including a payroll contact, web administrator, and reporting official. As noted below, most REs had two unique email contacts available.

1.1 Data Collection

The initial contact list for the survey was provided by TRS and included 2,158 unique email addresses representing 1,348 REs, including public schools, charter schools, and colleges and universities. The survey methodology was designed to target payroll contacts. For REs without a payroll contact, a reporting official was substituted as the RE's contact. In those cases, if a reporting official was unavailable, a web administrator served as the RE's contact.

Invitation emails were sent to each unique email address asking potential respondents for help in completing the survey. The invitations included language assuring potential respondents that their responses would remain confidential and the survey results would only be used to improve TRS services. To ensure the invitation was sent to the appropriate person, the invitation emails also asked the recipients to either forward the survey invitation to the appropriate individual at their RE (if the recipient was not the appropriate individual) or to respond with the appropriate individual's contact information so the survey could be sent to them. Whenever an initial contact was provided, a link to the survey was sent to the new contact.

Approximately one-week prior to the start of the survey, TRS alerted potential respondents to look for the survey in their inboxes and spam folders. This type of official organizational endorsement has been found to increase survey response rates.

Thirty-seven of these email addresses bounced, ten were not delivered, and eight contacts unsubscribed, leaving 1,293 Res with at least one valid email addresses and 2,103 individual contacts. Of the 55 contacts that were not delivered or unsubscribed, four were corrected and fourteen pointed us to the current contact for the RE. In an effort to improve response rates, emails that bounced or were not delivered due to an invalid email address, as well as for individuals who did not respond, the individual was called up to four times to get an updated email or new contact, or to ask to complete the survey. Where available, an alternate email address was used for each of these "bounced" emails. Subsequent email reminders were scheduled to be sent approximately one week apart, encouraging potential respondents to take the survey. Potential respondents received up to five unique reminders requesting their participation in the survey.

1.2 Quality Review

The survey response data was reviewed to determine the validity of individual responses. Responses were reviewed to ensure respondents took a reasonable amount of time to complete the survey, they responded to enough of the items to provide meaningful content, and their responses varied from one item to the next. Respondents who completed the survey too quickly (less than a minute), who answered less than a third of the survey questions, or who answered the same way across all items were removed from the final data. In addition, duplicate survey responses were removed from the survey. Out of the 910 respondents who began the survey, 897 respondents (99%) were valid for analysis and represented 893 organizations. The final results from 2023 were based on 904 individual respondents representing 893 REs. For comparison, the final results from 2022 were based on 766 individual respondents representing 845 REs. Overall, the response rate to the survey of represented REs increased from 63% in 2022 to 66% in 2023. This can be interpreted to mean that 66% of REs with at least one contact with a valid email address completed the survey.

For survey researchers, low response rates are generally less troubling than the potential for response bias. Response bias is the difference between respondents and non-respondents in their evaluations, attitudes, and behaviors. The representativeness of survey respondents, and not the overall response rate, is critical in determining the representation of a survey to the population. Table 1 provides insight into the representativeness of the 2023 RESS by comparing population parameters—based on the original sample data provided by TRS—to sample characteristics of survey respondents.

Table 1 includes a comparison of the original list of all REs provided by TRS (N=1,348) to individual survey respondents and to the organizations represented in the survey. For the data included in the column 3, it should be noted that an individual can represent multiple REs. The first column of Table 1 (All Reporting Employers) presents data for all 1,348 REs. The second column presents data for individuals who validly responded to the survey (N=897). The third and final column presents data for REs represented by the survey (N=893). The same individual respondent may represent multiple REs (n = 58).

As Table 1 shows, the survey respondents are representative of RE Coach color and RE type. There are only minor differences between the REs represented by survey respondents and all REs on these key characteristics. This result gives us greater confidence that the final results reflect the larger population of REs.

Finally, surveys can be used to estimate population parameters or to provide strategic and actionable information to an organization or actor. Satisfaction surveys of this type typically yield responses from participants who have the strongest feelings on the subject at hand and, subsequently, have something to say. As such, the RESS should identify areas of concern and issues that need to be addressed. Perhaps stated differently, if there are biases in these responses, they should be toward more negative evaluations of TRS services because these would typically be the individuals most motivated to respond to the satisfaction survey.

Table 1. Comparison of Population and Sample by RE Coach Color and RE Type

| | All Reporting Employers | | Survey Respondents | | REs Represented | |
|------------------|-------------------------|-------|--------------------|-------|-----------------|-------|
| | Count | % | Count | % | Count | % |
| RE Coach Color | | | | | | |
| Aqua | 60 | 4.5 | 38 | 4.2 | 40 | 4.5 |
| Brown | 97 | 7.2 | 60 | 6.7 | 62 | 6.9 |
| Coral | 95 | 7.0 | 69 | 7.7 | 67 | 7.5 |
| Gold | 87 | 6.5 | 56 | 6.2 | 54 | 6.0 |
| Gray | 94 | 7.0 | 62 | 6.9 | 64 | 7.2 |
| Green | 95 | 7.0 | 68 | 7.6 | 69 | 7.7 |
| Navy | 88 | 6.5 | 55 | 6.1 | 58 | 6.5 |
| Olive | 60 | 4.5 | 36 | 4.0 | 33 | 3.7 |
| Orange | 60 | 4.5 | 38 | 4.2 | 46 | 5.2 |
| Pink | 60 | 4.5 | 46 | 5.1 | 40 | 4.5 |
| Purple | 60 | 4.5 | 48 | 5.4 | 40 | 4.5 |
| Red | 93 | 6.9 | 60 | 6.7 | 57 | 6.4 |
| Ruby | 60 | 4.5 | 40 | 4.5 | 35 | 3.9 |
| Silver | 95 | 7.0 | 62 | 6.9 | 63 | 7.1 |
| Teal | 87 | 6.5 | 54 | 6.0 | 60 | 6.7 |
| Violet | 60 | 4.5 | 39 | 4.3 | 39 | 4.4 |
| White | 97 | 7.2 | 65 | 7.2 | 66 | 7.4 |
| RE Type | | | | | | |
| Higher Education | 107 | 7.9 | 77 | 8.6 | 69 | 7.7 |
| Public Schools | 1241 | 92.1 | 820 | 91.4 | 824 | 92.3 |
| Total | 1348 | 100.0 | 897 | 100.0 | 893 | 100.0 |

2 Survey Results

2.1 Overall Quality

Survey respondents were first asked to provide an overall rating of TRS services. The specific question wording is listed as follows:

“Overall, how would you rate the quality of service your organization receives from TRS?”

This question is presented first in an attempt to capture an immediate reaction. Figure 1 presents a longitudinal comparison of the 2023 results with the previous two years. The 2023 results show an increase in “excellent” responses from 23% in 2022 to 30% in 2023. More than 80% of respondents report good or excellent ratings for the quality of TRS services each of the past three years. Results from 2023 are improved compared to 2022.

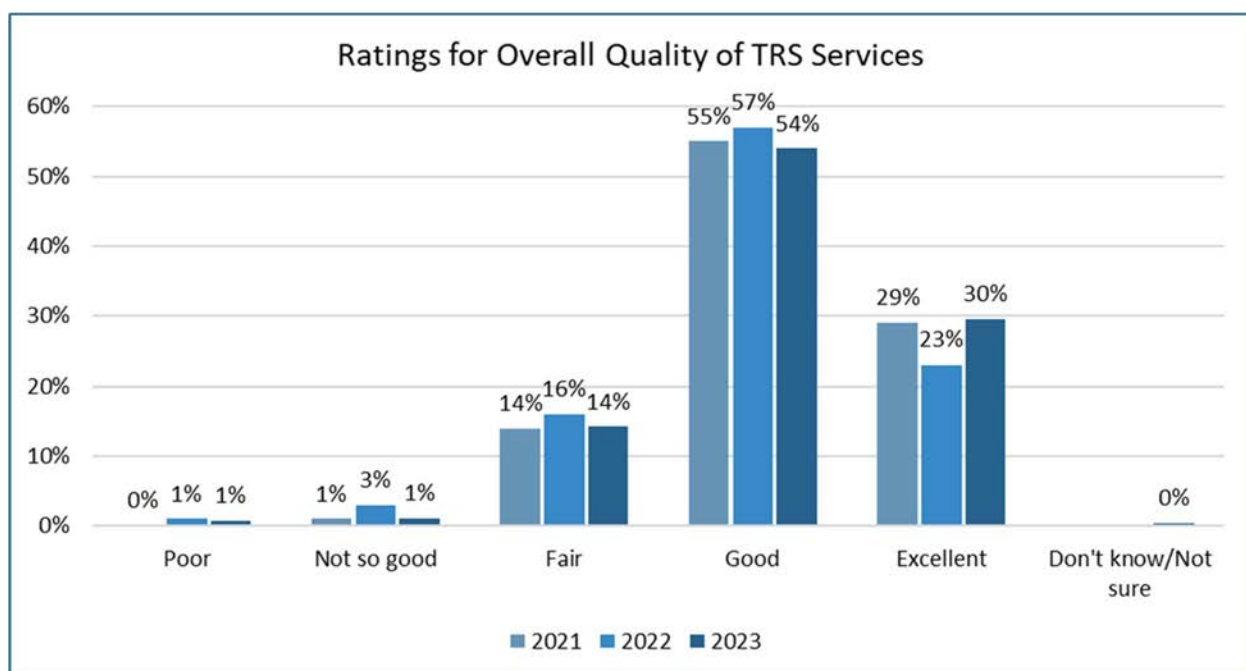


Figure 1: Ratings for Overall Quality of TRS Services

Respondents from public schools had statistically significantly higher mean scores for overall quality of service (Public School: Mean=4.14, $SD=.74$; Higher Education: Mean=3.91, $SD=.63$) and overall experience (Public School: Mean=4.02, $SD=.79$; Higher Education: Mean=3.80, $SD=.66$) with the agency compared to higher education. Respondents who represented multiple REs did not have significantly different overall quality ratings than respondents who represented only one RE.

The second question asks respondents to rate their overall experience with the agency. The results presented in Figure 2 are similar to those presented in Figure 1. Ratings for quality of service and overall experience are highly correlated ($r=.71$). These results imply that ratings of overall services largely correspond with ratings of one’s experiences with the agency. This correlation is lower than last year ($r=.86$). Respondents from public schools had statistically significantly higher mean scores for overall quality of service (Public School: Mean=4.14, $SD=.74$; Higher Education: Mean=3.91, $SD=.63$) and overall experience with the agency (Public School: Mean=4.02, $SD=.79$; Higher Education: Mean=3.80, $SD=.66$) than did respondents from higher education.

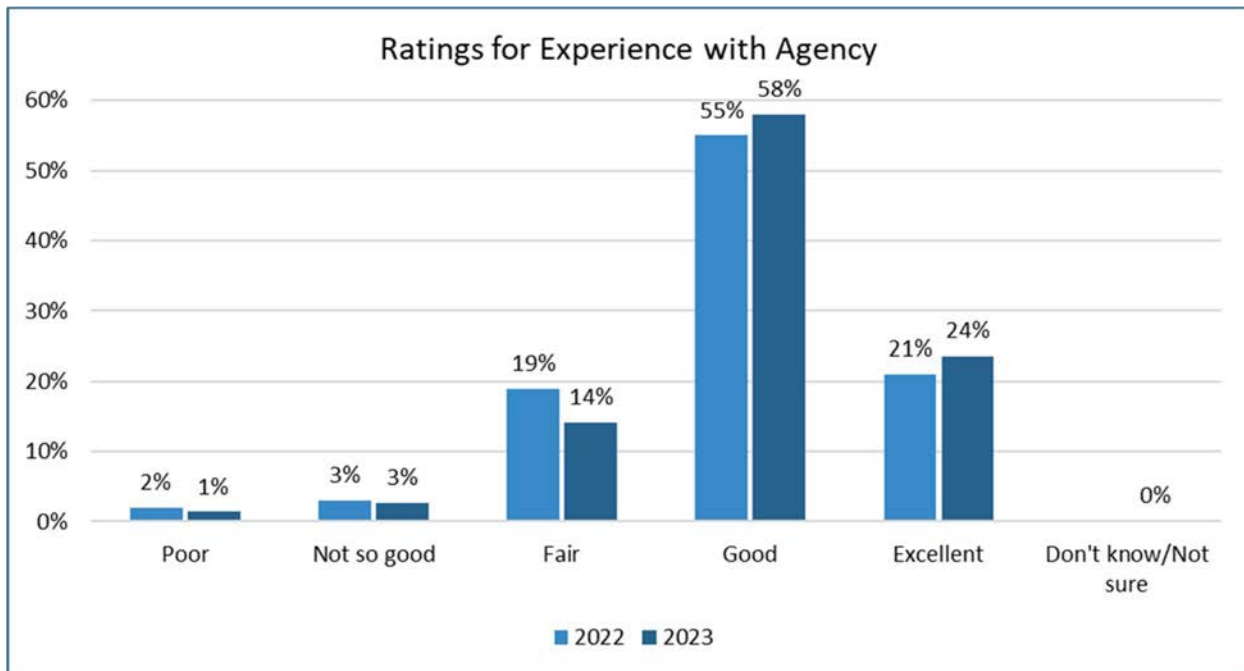


Figure 2: Rating for Experience with Agency

2.2 Changes to TRS Services

To gain insight into the evaluation of the quality of TRS services, respondents were asked the following open-ended question: “What, if anything, would you change about the services TRS provides to its REs?” This is asked early in the survey and immediately following the ratings questions to get unstructured “top of mind” responses. Overall, 51.3% of the 2023 survey respondents provided a response. This is a significant increase over 2022 when only 40% of respondents provided a response. Because they require more effort on the part of survey respondents, open-ended comments in satisfaction surveys typically reflect dissatisfied customers who offer more detailed comments and suggestions for improvement.

To analyze the results, we read through each comment and coded the responses according to themes present in the individual’s answer. Responses were coded into categories. For example, a respondent might note the need for quicker response times from TRS while also questioning the reporting deadlines. The categories identified were based both on previous year’s survey results and our close reading of the responses in the 2023 survey. In Table 2, we present the number of open-ended comments coded to each theme in the individual responses. It is important to note that each percent represents the percentage of survey respondents who answered this question rather than the percentage of total survey respondents. The most common coded themes included: (1) improving response times, (2) extending deadlines, (3) improving the RE Portal, (4) provide training, and (5) provide different ways to contact.

Of the open-ended responses, several of the categories were similar to those expressed in previous years. One quarter of respondents (25.4%) who offered a comment noted the need for quicker response times and 15.7% noted the need to extend deadlines. Respondents also stated that the reporting portal needs to be improved (11.5%). A related theme that emerges in some comments is the need for TRS to provide training (8.0%). Respondents also asked for different ways to contact RE Coaches (7.6%). Representative comments of the five most common themes are included below.

Table 2. Frequency and Percent of Coded Open-Ended Responses for How TRS Could Improve Services

What, if anything, would you change about the services TRS provides to its Reporting Employers?

| Response Category | Count | % |
|--|-------|-------|
| Improve response times | 117 | 25.4 |
| Extend deadlines | 72 | 15.7 |
| Improve the RE Portal | 53 | 11.5 |
| Provide training | 37 | 8.0 |
| Provide different ways to contact RE Coaches | 35 | 7.6 |
| Provide efficient ways to correct errors | 27 | 5.9 |
| Provide better quality instructions | 21 | 4.6 |
| Improve quality of communication | 22 | 4.8 |
| Need for additional RE Coaches | 19 | 4.1 |
| Improve accessibility to reports and data | 19 | 4.1 |
| Comment about their RE Coach | 17 | 3.7 |
| Change requirements | 10 | 2.2 |
| Improve access to coaches | 5 | 1.1 |
| Making technical changes | 2 | 0.4 |
| Be more understanding of res | 1 | 0.2 |
| Allow RE's to contact each other | 1 | 0.2 |
| Improve payment options | 1 | 0.2 |
| E-mails should be sent in secure message | 1 | 0.2 |
| Total | 460 | 100.0 |

2.2a Improve Response Times

One quarter of respondents (25.4%) who offered a suggestion for improving TRS services said something about improving response times. The challenge with response times remains similar to previous surveys. REs think that a two-day response is unreasonable when pressing deadlines approach and there should be a faster response time when dealing with issues that need to be addressed urgently. Below we include examples (in italics) of the verbatim responses from survey respondents.

- *Considerable effort needs to be put into improving the TRS coach's response times in order to help the reporting officials.*
- *1) How quickly responses are given. We have deadlines to meet and await responses that may take up to two days to respond. 2) The day the reportings are due is difficult during holidays. It shortens the number of days available to process TRS.*
- *1) Ability to get confirmation for electronically 2) submitted documents like TRS 8's 3) Quicker more timely response to ORP/TRS overrides 4) Ability for RE's to search for TRS 28 confirmation 5) ability to see if employee is working at another TRS covered employer*

- *As explained previously in this survey. More time for making the Texnet deposit, especially when holidays are involved. Have someone on call to answer questions 24 hours a day, 7 days a week, we're at work trying to process our TRS, and there should be someone to help us if we need it, no holidays or weekends off, we don't get them because of TRS.*
- *Faster response times around the time when reports are due. Most people I feel like have other jobs and can only work on TRS at certain time and it makes it hard to get reports complete when you don't get an answer.*
- *I would change the response time. The deadline and amount of information required from employers is too vast to have a 2 day turnaround on a response.*

2.2b Extend Reporting Deadlines

Fifteen percent of responses (15.7%) speak to issues regarding reporting deadlines. It is important to note that concerns about reporting deadlines go hand-in-hand with concerns about response times. Any issues that need to be resolved in reporting are difficult to address with a two-day standard response. In addition, deadlines often fall on holidays or weekends that make reporting even more difficult.

- *Faster response time to emails. The entities are depending on the answers to questions. In addition, the deadlines for the reporting needs to be reviewed. TRS states the deadlines are determined by legislation. TRS should request a change to the deadline to allow entities to accurately complete reporting, while still meeting the deadline*
- *I would definitely change the time frame for the coaches to respond to the employer. It needs to be sooner than 24 to 48 hours. Also the due date for the ED and RP records. We need it changed back to the 10th of each month.*
- *More time to get reports to completed status without penalties (the ER date was changed to the 10th, why can't the other reports be changed?). Penalties need to be removed - we want to be accurate & efficient, just like TRS wants it to be, but we all wear many hats within most Districts - we don't have manpower for someone to do just TRS reporting, and I can't pull some data until after the last day of the month - and if there's a weekend or holiday, that eats into my reporting days. Faster response times from TRS/Coach (mine is great right now, but I know others aren't getting timely responses). No need for 3 verifications on deleted records.*
- *Because the due date is so early in the month it causes extra work getting days counted since timesheets are submitted once a week for tutors and subs in vacant positions....*
- *Extend deadlines for month end reporting. Difficult to gather and report information. Extend deadlines for month end reporting when for weekends and holidays.*
- *Have the legislature institutionalize the 30 day grace period. It is unrealistic to have RP reports done by the 6th of the month (especially in July and September with the 4th and Labor Day,)*

2.2c Improve the RE Portal

Nearly 12% of the comments focused on improving the reporting portal, specifically to make it more efficient, decrease steps to change a position code, have the system change the log history when correcting an error or editing a record, to have an electronic confirmation, as well as to delay routine maintenance to well after working hours, even later ones.

- *Have programmers/administrators sit with end-users and work to improve the reporting process in the portal and make it more efficient. It is heavy on the hard-set algorithms. Making changes/updates to a record should not be as complicated and labor intensive as it is currently. It shouldn't take four or five separate steps and overrides from the coach to change a position code that may have been accidentally reported incorrectly or anything else like that. Can we edit a record and the system can log the change history? I understand the need to document changes, but surely there is a more efficient way. Also, can we extend the reporting deadlines? We can't report until the end of the month because of payrolls still processing at the end of the month. I don't know about other districts, but we run each report and make sure they are all complete before processing our TEXNET. Getting through the reports takes some time if there are issues that need to be worked through. And if there is a weekend or a holiday at the beginning of the month, it shortens the time we have even more. As someone who is a one-person department for payroll and TRS reporting, this would alleviate some pressure and hopefully reporting errors.*
- *1)Ability to get confirmation for electronically 2) submitted documents like TRS 8's 3) Quicker more timely response to ORP/TRS overrides 4) Ability for RE's to search for TRS 28 confirmation 5) ability to see if employee is working at another TRS covered employer*
- *I would like it if the system wasn't down for maintenance beginning at 7pm. It would be nice if that would start later in the evening so we can continue working during more reasonable hours instead of waiting until late at night.*
- *If we could add code to allow dashes in the social security number box when entering employee information that would be helpful. Also coding the program to calculate the current % of contributions for each employee would be helpful vs just erroring that its incorrect. i.e. the correct % is 8% which is 184.56.*
- *Stop making us change passwords every 2 weeks, it is VERY ANNOYING. Stop making updates to the system every weekend, when most of us have time to work on your reporting, it is VERY ANNOYING*

2.2d Provide Training

Comments about training, made in 8% of responses, generally fall into one of two categories: (1) training for RE Coaches to provide more accurate information and 2) training for REs, including covering errors received and offering more training sessions throughout the year.

- *Provide a resource for error messages that would be kept up to date in order to be our first guide when coming across new error messages. Provide possible reasons for error being triggered. - Response time -Trainings for clearing errors and submitting reports to prevent complicated errors*
- *Being a new person reporting, I wish that training was offered more often. I have reviewed the training documents and worked with my coach, but there is such a learning curve for someone new.*
- *Extensive training for TRS coaches so that they can provide better service for RE's. I would suggest a dedicated team for RE's that way when you have turnover the impact isn't felt as significantly and RE's aren't left waiting for response from one individual.*
- *It would be nice if training (workshops, videos etc.) was offered to new or fairly new district employees who are responsible for TRS reporting. This training could help newer employees understand what to do and what not to do, how to resolve errors.*

- *More training options. I was new to reporting and missed the training date and could not receive training until another date came up. It took months. I wish the trainings were just available at any time.*

2.2e Provide Different Ways to Contact

Comments about TRS, made in 8% of responses, generally fall into one of two categories: (1) Positive comment about a specific RE Coach, including comments noted variance in performance across RE Coaches; (2) More general comments about the need for more RE Coaches and/or the need for less turnover and more consistency across RE Coaches.

- *I wish there was a live chat option when issues occur. I usually receive information back from our coach about dealing with them, but sometimes the delay is such that it would put us late if we didn't have the grace periods.*
- *A chat function would be great to be able to get more immediate answers rather than waiting 24-48 hours for an email.*
- *Allow a reporting employer to be able to speak with a TRS representative. I cannot even contact a representative by phone. Sometimes situations need to be explained and an actual conversation needs to be had. This is not possible with TRS.*
- *Availability to conduct live chat with TRS Coach.*
- *I would not have them email the RE's through the secure emails. The RE's can't store those emails and they expire after 30 days so we can't go back to reference them at all after that 30 day period. It was originally told to us that it was to be used for using full socials in emails. They aren't using it for that.*
- *I would prefer there be a call center with knowledgeable staff to speak with immediately versus having 1 dedicated 'coach'.*
- *I'd like more opportunity to communicate verbally with my coach.*
- *It is really hard to email my coach. When I finally get the email to go through and a return email from my coach, I can not reply to them from the email that they sent me.*

2.3 Contact with Reporting Employer Coach

Respondents were directed to describe the frequency of RE Coach interaction. Results were compared to previous years. The specific question wording is as follows:

“In a typical month, how often does your organization call or email a Reporting Employer Coach?”

Previous versions of the survey separated “never” and “rarely” and so the full results are presented for 2023 along with the combined category to enable longitudinal comparisons. Less than 3% of respondents said they “never” contacted their RE Coach in the 2021-2023 surveys (Figure 3).

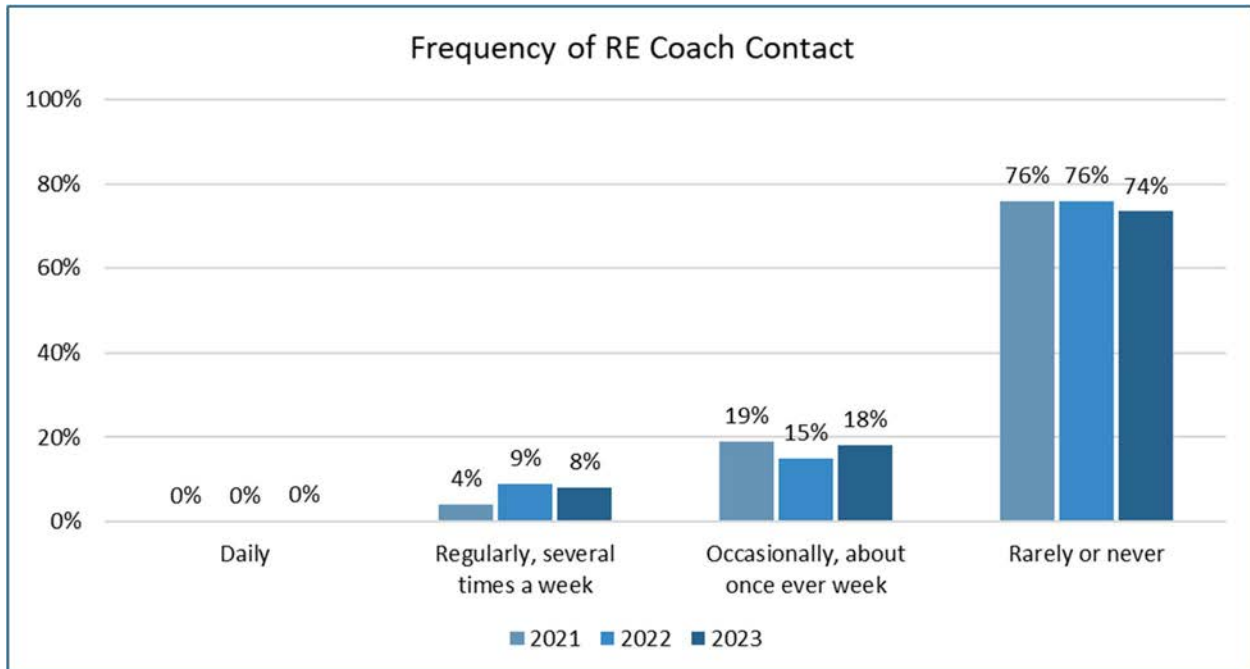


Figure 3: Frequency of RE Coach Contact

Continuing with recent trends, most respondents (74%) reported “rarely” or “never” contacting their RE Coach. Respondents maintained an increased regularity (8%) for contacting their RE Coach first seen in 2022. Increased communication would be expected to decrease satisfaction since REs typically contact TRS when they have a problem or a concern.

Differences in RE Coach contact by RE type remain consistent compared to previous years (Figure 4). Respondents representing higher education report contacting their RE Coach more often than respondents representing public schools. Higher education reporting rates in 2023 are comparable to 2021 rates more similarly than 2022. This may indicate a return to previous trends for these institutions. There was a decrease from 45% in 2022 to 31% in 2023 for REs in higher education institutions rarely contacting their coaches. Public school coach contact frequencies were nearly identical in 2022 and 2023, with 77% of REs representing public schools reporting rare coach contact in 2023.

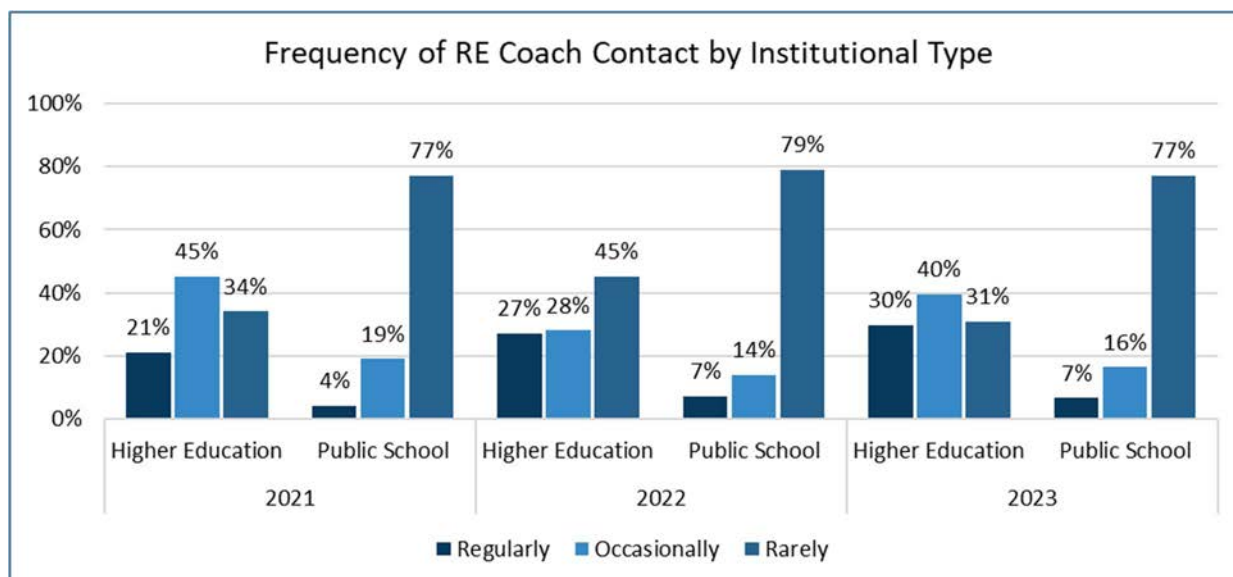


Figure 4: Frequency of RE Coach Contact by Institutional Type

Quality of Service Received by Reporting Employer Coach

REs were asked to rate their RE Coach on various attributes. The first question asks respondents to rate the “quality of services” received by their RE Coach. The specific question wording is as follows:

“How would you rate the quality of service you receive from your Reporting Employer Coach?”

Continuing the trend from previous years, respondents generally rate their RE Coach more favorably than overall TRS services. Indeed, the percentage of REs rating their RE Coach as “excellent” (53%) or “good” (37%) remained comparably high to 2022 levels. This improvement continues the trend of positive RE Coach evaluations (Figure 5).

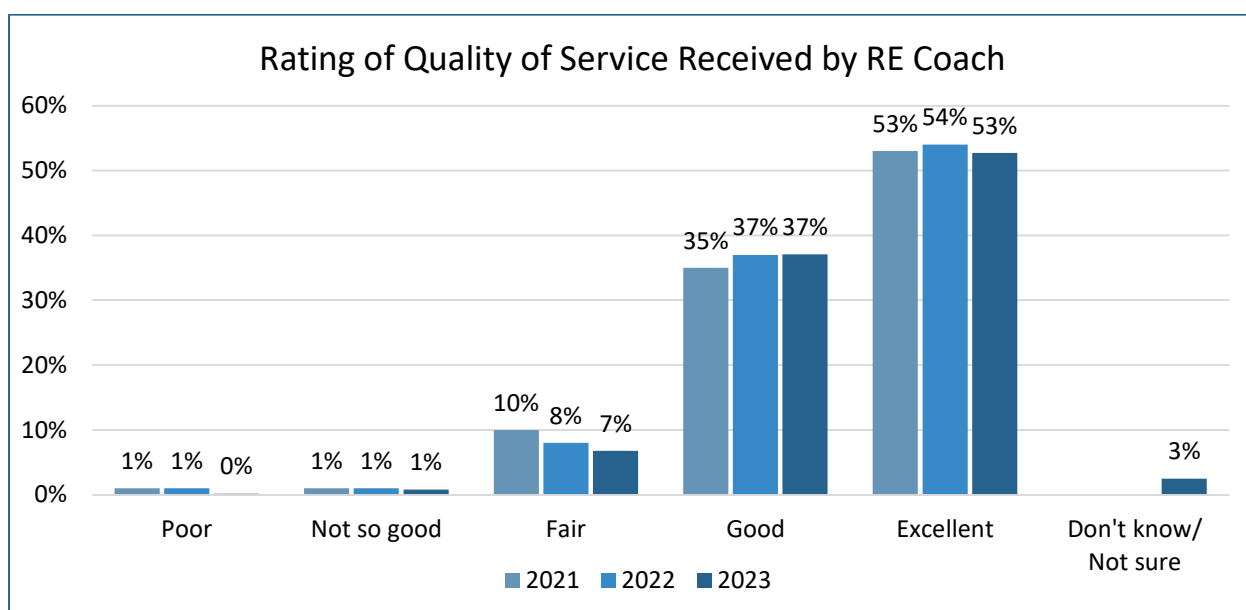


Figure 5: Rating of Quality of Service Received by RE Coach

Historically RE Coaches are perceived as allies in dealing with the complexities of the RE Portal and meeting reporting deadlines. There are no notable differences by employer type, meaning that representatives of colleges and universities evaluate their RE Coaches similarly to representatives from public schools. There are notable differences by respondents who represent multiple REs compared to respondents who represent a single RE. Respondents who represent multiple REs rate the quality of service received from their RE coach lower than respondents who represent a single REs (Figure 7).

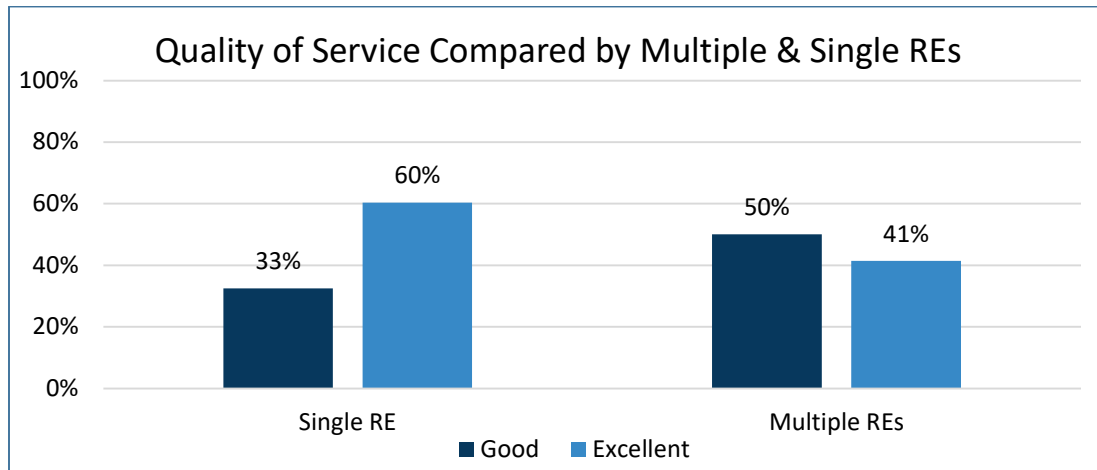


Figure 7: Rating of Quality of Service Received by Single RE and Multiple REs

Last year's survey asked respondents to rate their RE Coach "for courtesy, friendliness, and knowledge, and whether your RE Coach adequately identifies themselves by name?" The 2023 version separated each of these dimensions, including separating knowledge into RE Portal and reporting requirements. Results, presented in Figure 7a-7e, reveal generally positive evaluations of RE Coaches on these dimensions in nearly equal measure. Approximately two-thirds of respondents were "very satisfied" with each dimension. Respondents rated their coaches most highly in self-identifying by name (89%), portal knowledge (89%), and reporting requirements knowledge (89%). Analysis reveals that all of these ratings are positively correlated, suggesting that positive opinions towards coaches result in positive ratings for all dimensions of their responsibility and similarly negative opinions of coaches are associated with negative ratings for all dimensions. There is no difference in ratings by respondents who represent multiple REs compared to respondents who represent a single RE.

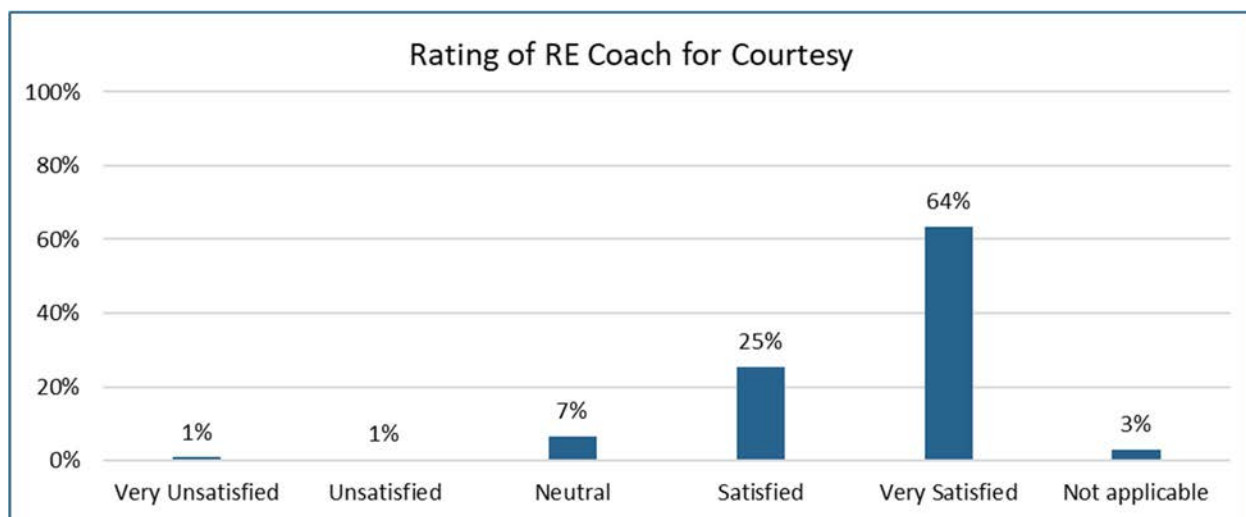


Figure 7a: Rating of RE Coach for Courtesy

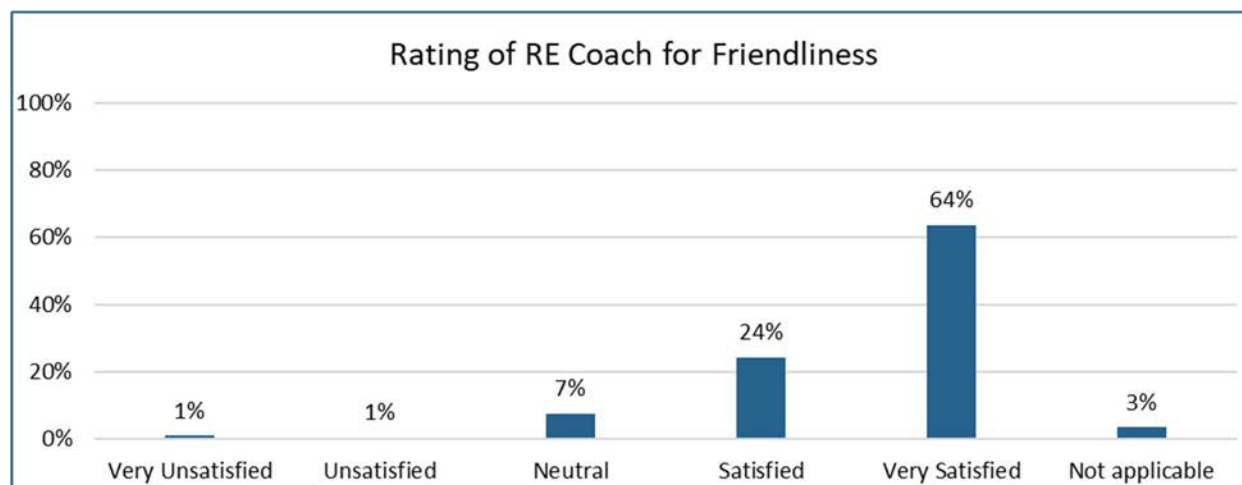


Figure 7b: Rating of RE Coach for Friendliness

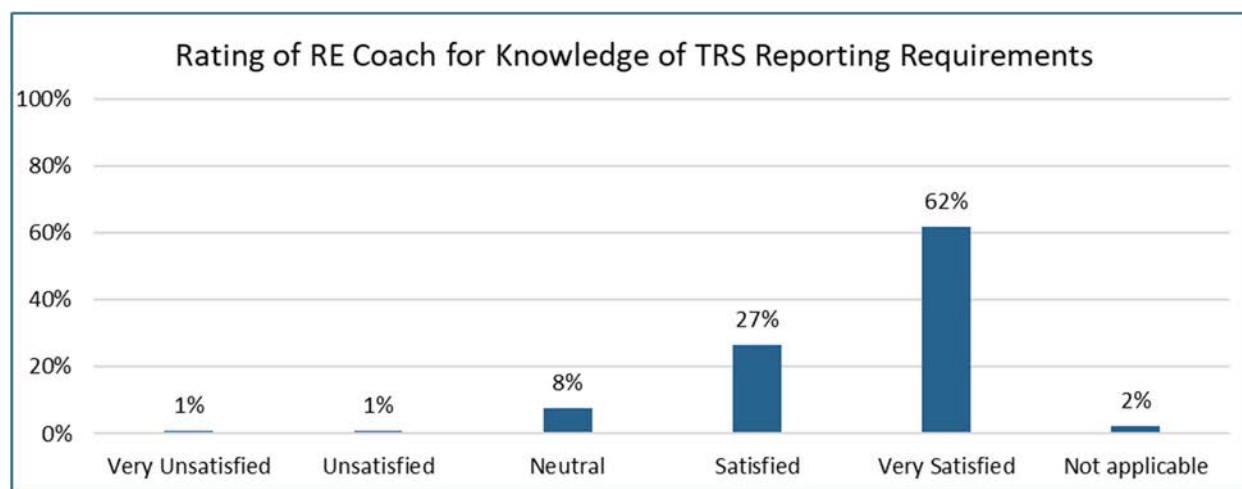


Figure 7c: Rating of RE Coach for Reporting Requirements Knowledge

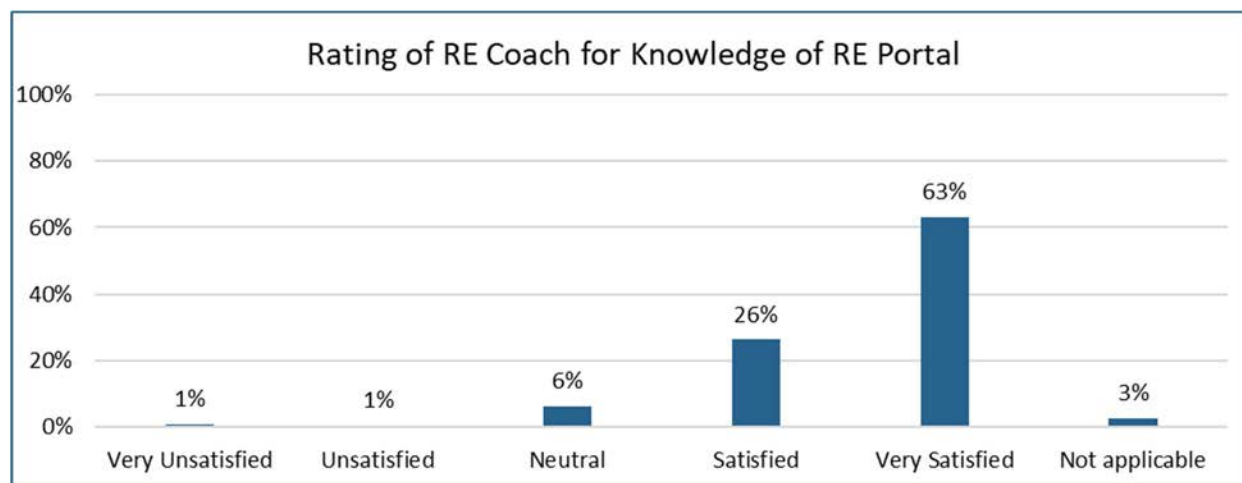


Figure 7d: Rating of RE Coach for Portal Knowledge

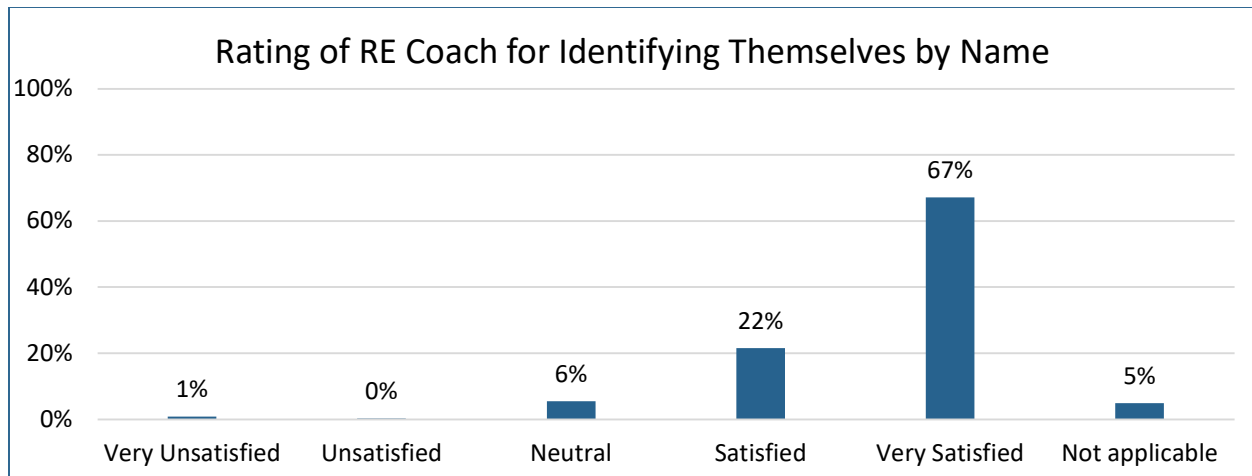


Figure 7e: Rating of RE Coach for Identifying by Name

2.4 Rating of Reporting Employer Coach by Dimension of Service

RE Coaches are given positive marks for all dimensions of service again in 2023 (Figure 8). “Being available so that you can speak to a person on the phone,” remains the least positively evaluated service. Even here, however, 39% of REs rate they are “very satisfied” in terms of their availability and another 24% rate that they are “satisfied” with their availability. For each of the other dimensions, respondents were positive in their evaluations. The majority of REs indicated that they were “very satisfied” with their RE Coaches regarding explaining steps needed to correct errors (57%), understanding and responding appropriately to questions (56%), communicating via email (56%), responding within the current service standard time (52%), and directing respondents to appropriate resources on the website (50%).

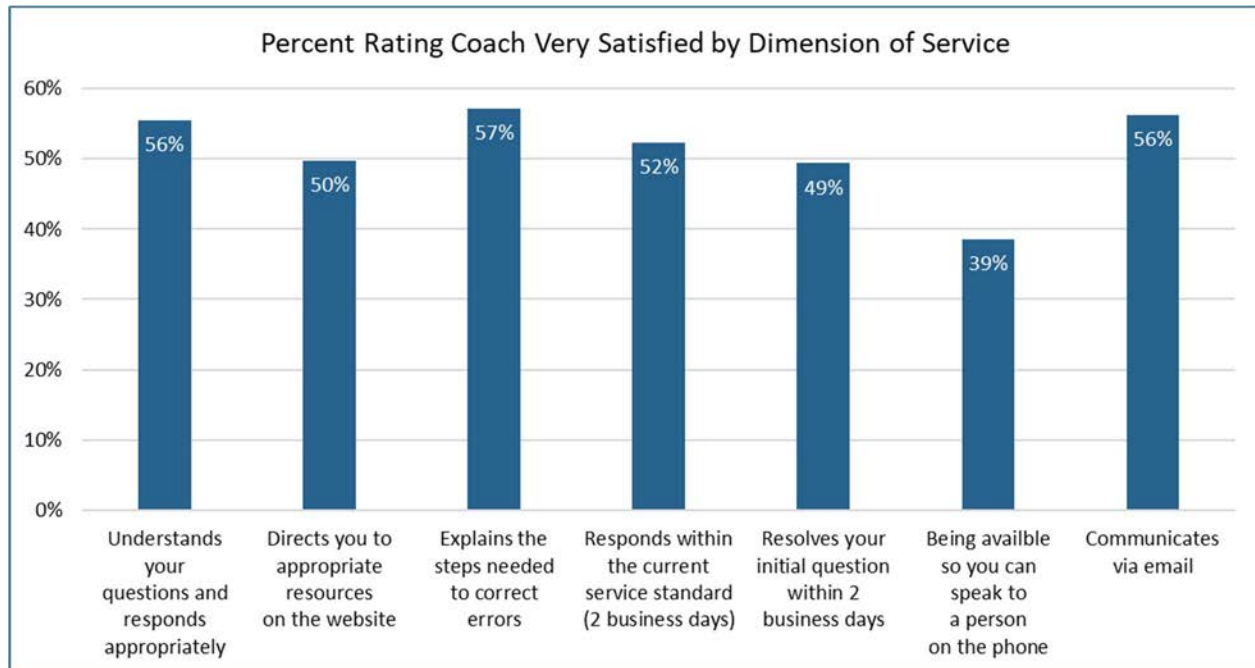


Figure 8: Percent Rating Coach Very Well by Dimension of Service

Figure 8 presents the results of the evaluation of RE Coaches by dimension of performance. Respondents reported their satisfaction levels with the various aspects of RE Coach’s service. The responses were updated to ascertain satisfaction levels rather than excellence levels. Additionally, the scale was expanded to 5-points including a neutral option in order to explore more details in generally positive ratings. As such, longitudinal comparisons are not appropriate or relevant due to differences in scales and response options.

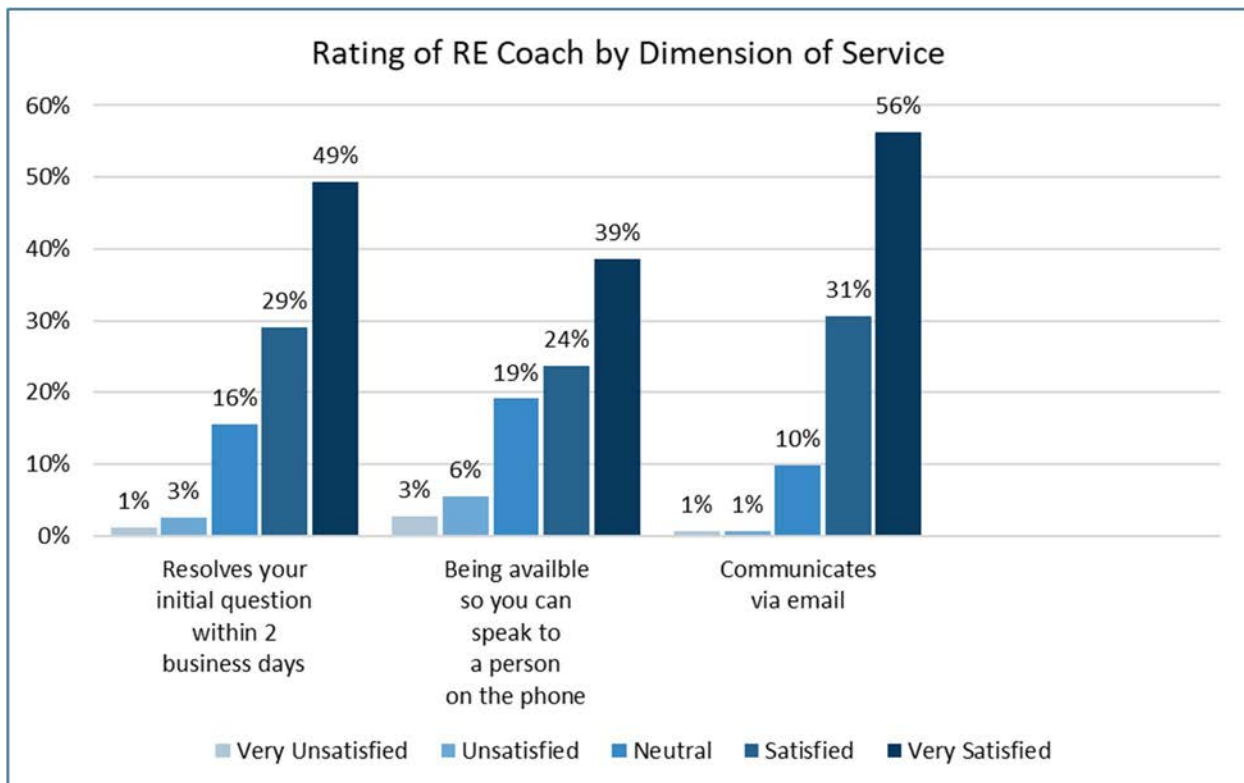
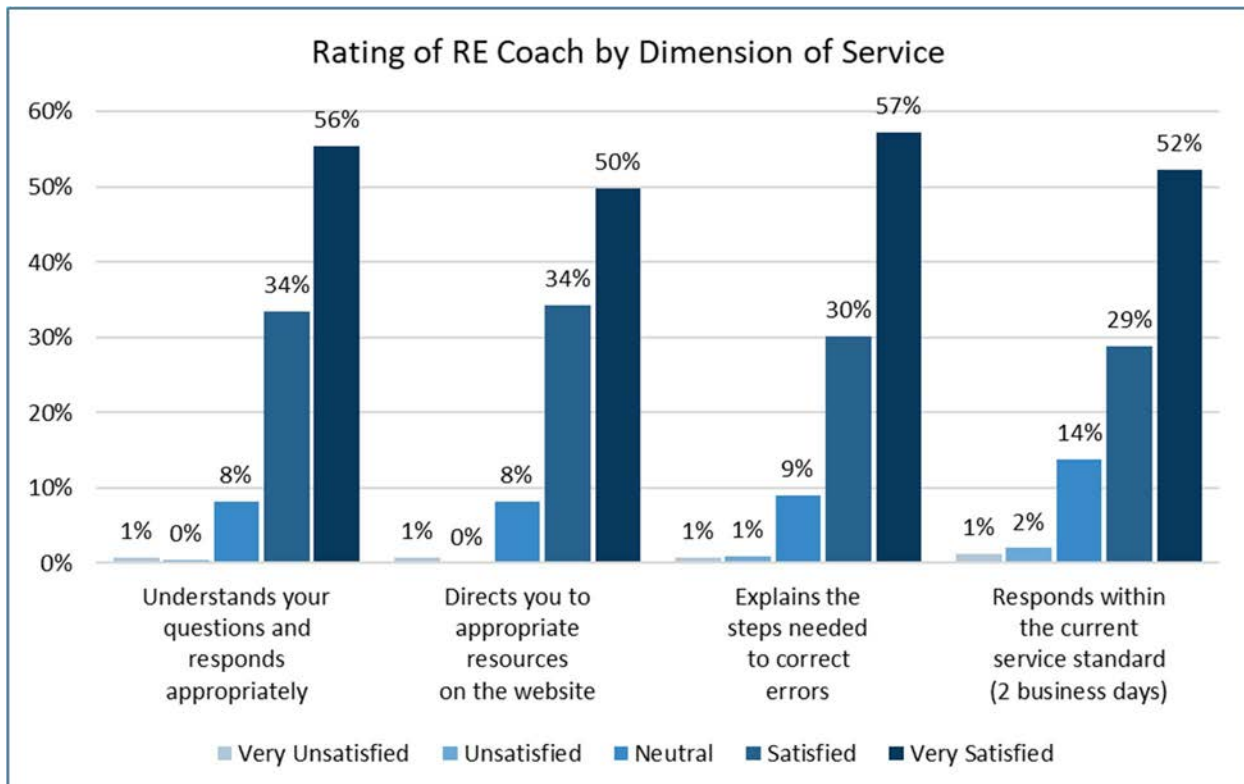


Figure 9: Rating of RE Coach by Dimension of Service. Item satisfaction percentages not summing to 100% reflect not applicable selection made.

2.5 Rating of the Importance of Services Provided by Reporting Employer Coaches

Survey participants were also asked to rate the importance of the services provided by RE Coaches. This scale was also expanded to 5-points to gain insight into consistently positive reviews of services. Even with the updated scales, REs rated all the services as “very important”. Even with the expanded scale options, results are almost identical to the past two years. As shown in Figure 10, “understanding your questions and responding appropriately”, “explaining the steps needed to correct errors”, “responding within the current service standard”, “resolving initial questions within two business days” (added in 2023), and “communicating via email” are considered almost universally “very important”.

Directing REs to appropriate online resources and being available to speak to someone on the phone are considered somewhat less important than the other areas of service, but are both considered important by more than two-thirds of REs. Comparing the importance of various services to evaluations of RE Coaches, RE Coaches perform well in those areas of services considered most important to the RE.

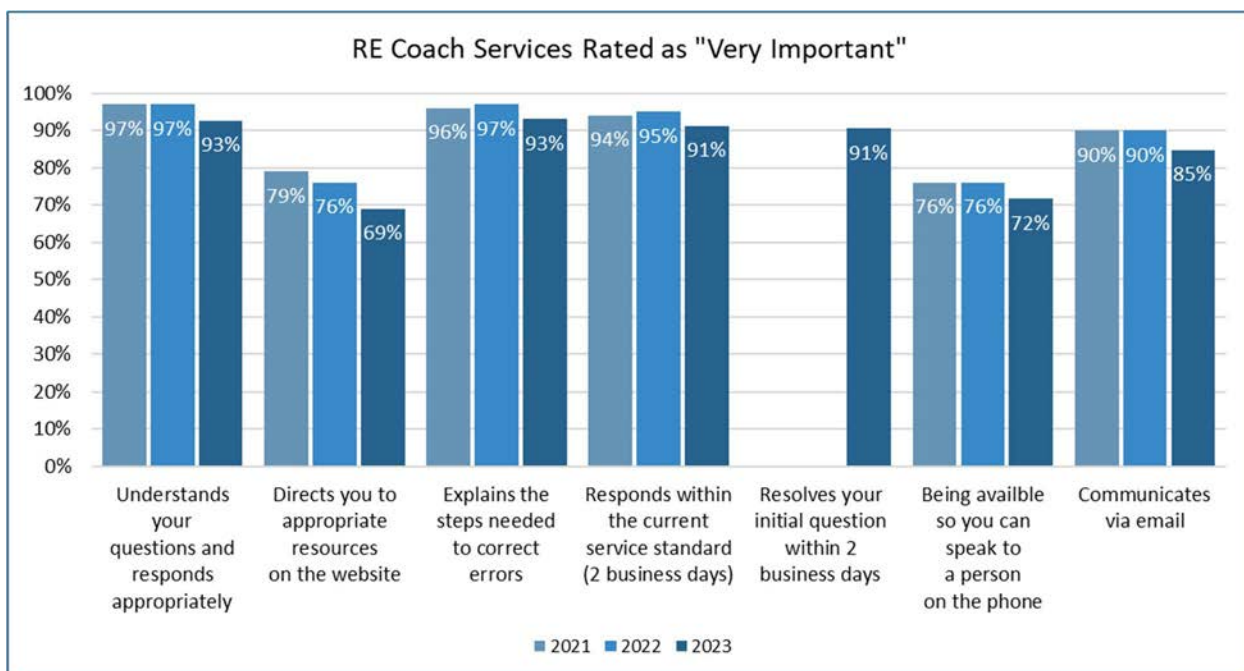


Figure 10: RE Coach Services Rated as "Very Important"

2.6 Intended Use of Online Chat

Survey participants were asked the following question to gauge their willingness to use online communication: “If online chat was offered as another way to communicate with your Reporting Employer Coach, how often would you use it?”

The results are presented in Figure 11 and show that nearly all (88%) would be willing to use online chat at least occasionally. Less than 3% of respondents said they would not use online chat and an additional 10% said they did not know or were unsure. The largest group of respondents said they would use online chat frequently (37%) and one quarter of respondents (25%) said they would use online chat all the time.

Additionally, in the open-ended responses, a number of respondents mentioned the availability of online chat as an improvement they would like to see in the services provided by TRS.

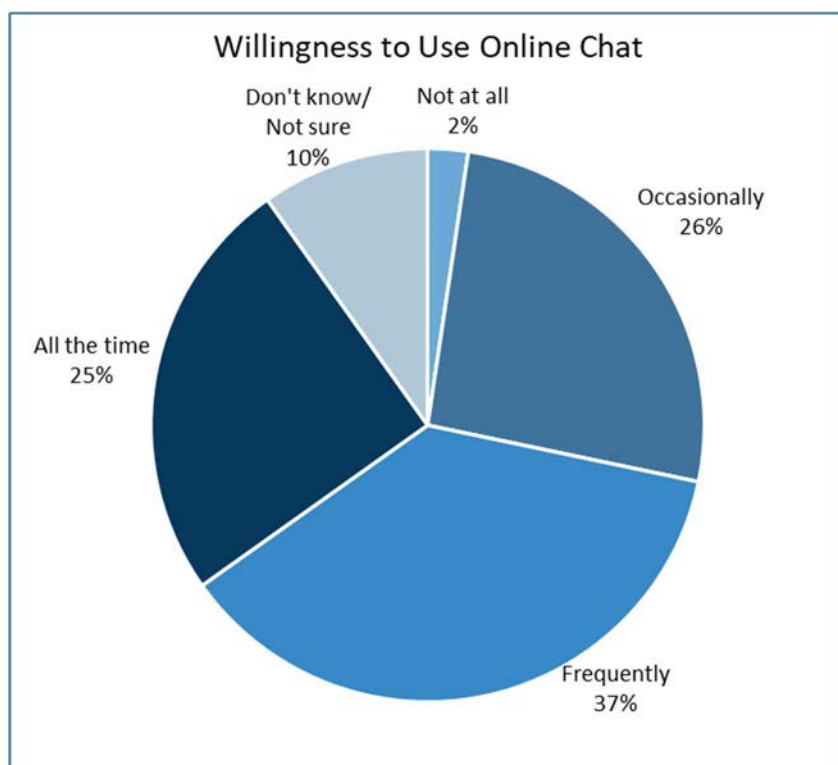


Figure 11: Willingness to Use Online Chat

2.7 Ranking of TRS Services

The culmination of the coach ratings requested respondents to rank the top three most important services provided by RE Coaches. Table 3 presents the results ordered by the number of respondents who ranked each service in the top three. For example, 855 respondents ranked “explain the steps needed to correct errors” as one of the most important services that RE Coaches provide while 813 respondents ranked “understand your questions and respond appropriately” in their top three for TRS services. The order of rankings did not change from previous years, suggesting the importance of various services is relatively stable.

Table 3. Ranking of TRS RE Coach Services (Number Ranking Services in Top 3)

| | 2023 | 2022 | 2021 |
|--|------|------|------|
| Explain the steps needed to correct errors | 855 | 719 | 747 |
| Understand your questions and respond appropriately | 813 | 663 | 673 |
| Responds with current service standard (2 business days) | 533 | 454 | 475 |
| Call so you can speak to a person on the phone | 344 | 306 | 302 |
| Communicate via email | 171 | 171 | 152 |
| Communicate via chat | 112 | 98 | 88 |
| Direct you to appropriate resources on the website | 81 | 46 | 74 |
| Something else (specify) | 13 | 26 | 18 |

As shown in Table 4, the most common other responses were coded under the categories increase responsiveness of coaches (45.5%), followed by over-complicated or unhelpful responses (9.1%).

Table 4. Frequency and Percent of Coded Open-Ended Responses for Other Service Rank

| Response Category | Count | % |
|---|-----------|--------------|
| Increase Responsiveness of Coaches | 15 | 45.5 |
| Over-Complicated or Unhelpful Responses | 3 | 9.1 |
| Communication method | 2 | 6.1 |
| Rude or Condescending | 2 | 6.1 |
| Requests chat feature | 2 | 6.1 |
| Happy with coach despite issues | 2 | 6.1 |
| Improve reporting process | 1 | 3.0 |
| Extend system access | 1 | 3.0 |
| Email Program Hard to Navigate | 1 | 3.0 |
| System Troubleshooting Does not Fix Problem | 1 | 3.0 |
| Suggestion: How to Optimize Chat Feature | 1 | 3.0 |
| Improve coach training | 1 | 3.0 |
| Happy with Coach | 1 | 3.0 |
| Total | 33 | 100.0 |

2.8 Standard Reporting Employer Coach Response Time

To gauge response time expectations respondents were asked the following question: “TRS’ goal is to respond to you within two business days. Do you think this timeline is reasonable?”

Results presented in Figure 12 reveal a continued decline in the perceived reasonableness of a two-day response time. In the 2023 survey 52% of REs thought a two-day time frame was reasonable compared to 56% in 2022 and 64% in 2021. The response rate for REs disagreeing that two-day response rates were reasonable remained constant at 39%. Responses to this question may reflect increasing response times over time.

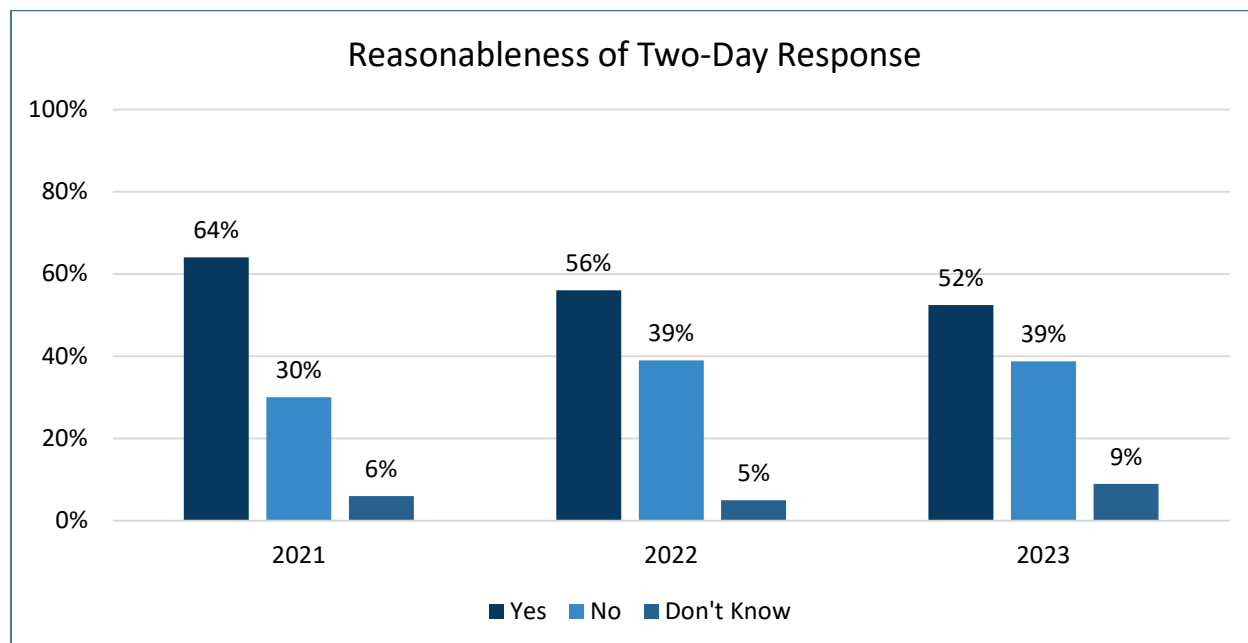


Figure 12: Reasonableness of Two-Day Response

Respondents who said a two-day response was not reasonable were asked in an open-ended follow-up question, “what response time would be reasonable?” Of the respondents who said that two days was not reasonable, most provided a written response to the follow-up question. Among those respondents who provided a written response, 53.5% said they should get a response within one day or within 24 hours. Nearly thirty percent (29.7%) of these respondents thought they should have a response from their RE Coach within a few hours or within the same business day or less than 24 hours, Table 5.

Table 5. Frequency and Percent of Coded Open-Ended Responses for Reasonable Response

| Response Category | Count | % |
|-----------------------------------|-------|-------|
| 1 day | 184 | 53.5 |
| Same day | 73 | 21.2 |
| No specific time given | 28 | 8.1 |
| Depends on External Factors | 11 | 3.2 |
| Immediately | 9 | 2.6 |
| 4 hours | 8 | 2.3 |
| With grace period, 2 days | 6 | 1.7 |
| 1 hour | 5 | 1.5 |
| 2 hours | 5 | 1.5 |
| 12 hours | 4 | 1.2 |
| Add emergency chat contact method | 3 | 0.9 |
| 3 hours | 2 | 0.6 |
| 6 hours | 2 | 0.6 |
| 8 hours | 2 | 0.6 |
| 30 minutes | 1 | 0.3 |
| Describes specific instance | 1 | 0.3 |
| Total | 344 | 100.0 |

2.9 Reported Reporting Employer Coach Response Time

Survey respondents reported increased response times in 2023 compared to 2022 and approach 2021 levels (Figure 13). In 2023, 53% of REs reported receiving a response from their RE Coach within 24 hours while 38% reported receiving a response within 48 hours. Only 8% of REs reported waiting longer than 48 hours for a response, indicating that 91% received a response within the designated two-day response window. Response rates historically correlate to RE Coach ratings and overall satisfaction levels. Faster reported response times may be partially responsible for the increase in overall ratings for TRS services.

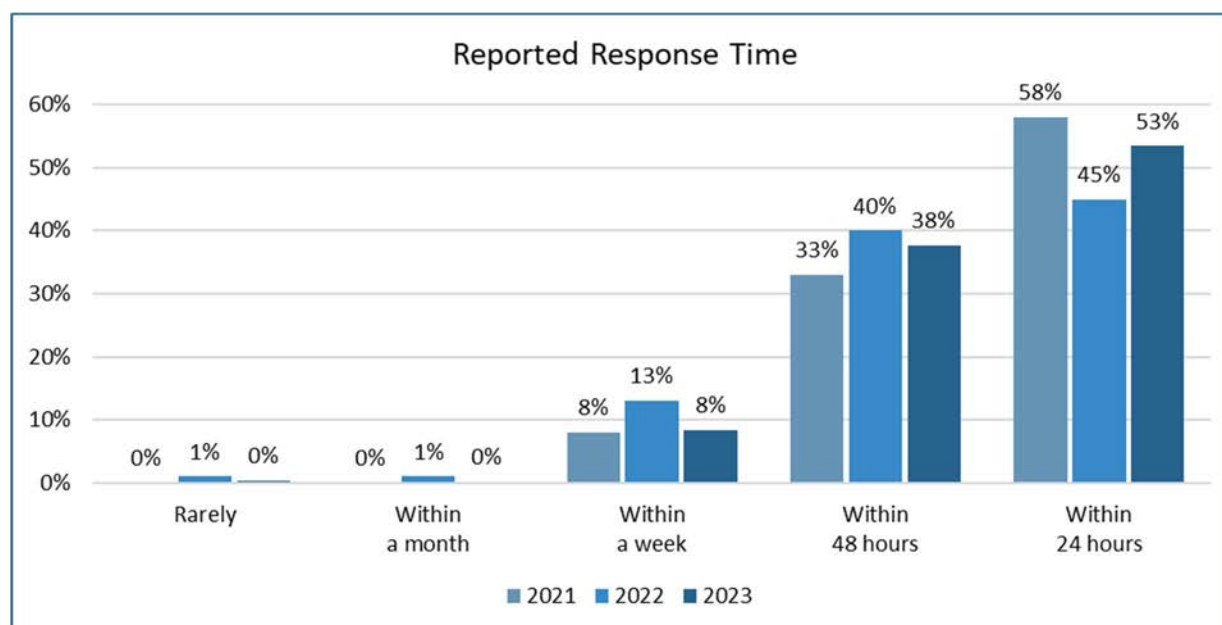


Figure 13: Reported Response Time

2.10 Training Attendance

Training attendance declined drastically since the COVID-19 pandemic and has persisted since. For the first time in recent years, fewer than half of the respondents reported attending training in the past year (49%), Figure 14. This is much lower than in pre-COVID years (72% in 2020) and likely reflects the effects of the ongoing pandemic for in-person attendance.

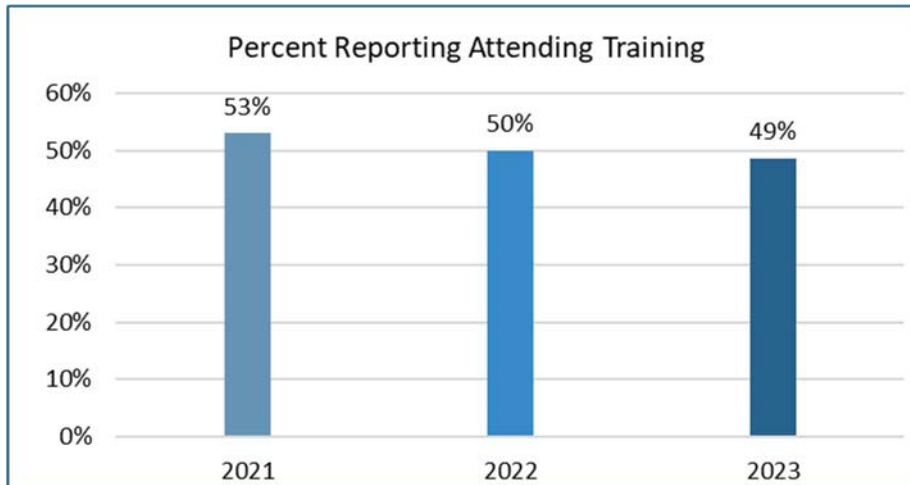


Figure 14: Percent Reporting Attending Training

Figure 15 displays which trainings REs reported attending over the past year. Respondents most frequently selected attending the Employer Reporting Refresher (N=264), Introduction to TRS Reporting (N=187), and RE Ledger Training (N=155). Given that REs stated a need for more training in their open-ended responses, this result presents something of a puzzle. Why aren't more REs attending training? Table 6 displays the response themes for the not attending reasons. The most common theme among the open-ended answers was work/scheduling conflicts (20.0%), followed by does not have time/too busy (14.9%) and not informed or aware of any (14.0%).

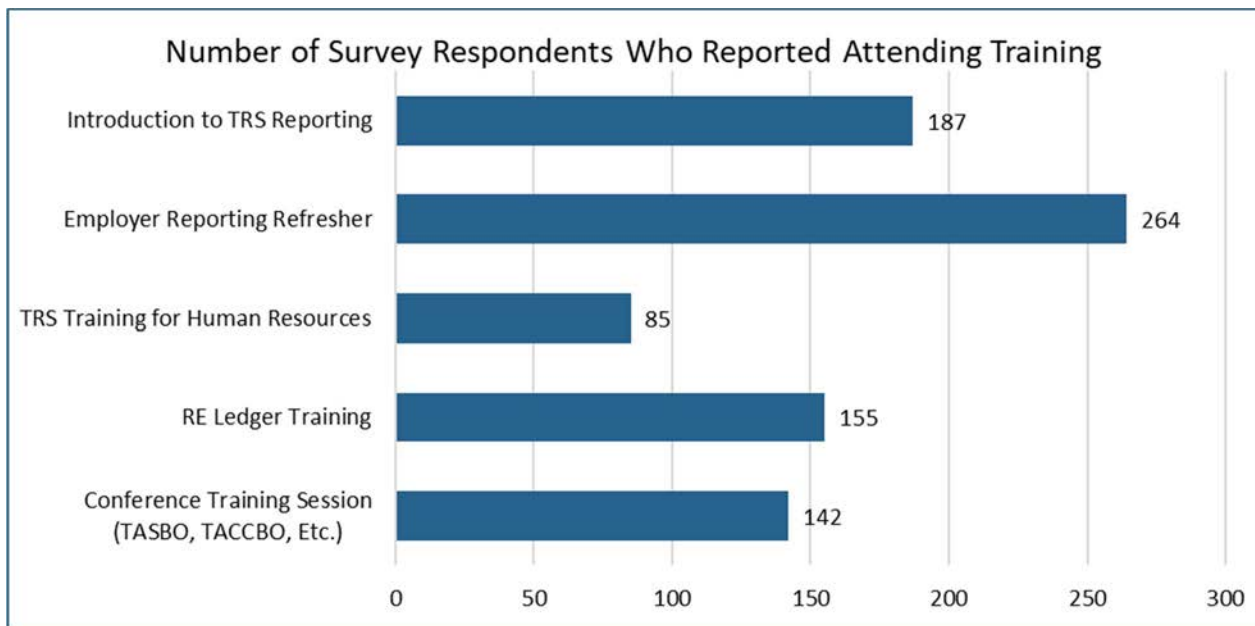


Figure 15: Number of Survey Respondents Who Reported Attending Training

Table 6. Frequency and Percent of Coded Open-Ended Responses for Reasons Not Attend Training

| Response Category | Count | % |
|--|-------|-------|
| Work/Scheduling Conflicts | 86 | 20.0 |
| Doesn't Have Time / Too Busy | 64 | 14.9 |
| Not informed or aware of any | 60 | 14.0 |
| No New Information / Unnecessary | 55 | 12.8 |
| Recent Hire / New Role | 31 | 7.2 |
| Location / Not Available in Area | 30 | 7.0 |
| Not Sure / Unclear / No Reason | 28 | 6.5 |
| Someone Else Attends | 12 | 2.8 |
| Not Required by Position/Didn't know it was Required | 12 | 2.8 |
| Attended Previous Years | 10 | 2.3 |
| Could Not Travel (COVID Restrictions, WFH, Medical) | 9 | 2.1 |
| "Unable to Attend" / Missed by Mistake | 7 | 1.6 |
| Intends to Attend in the Future | 5 | 1.2 |
| Other Form of Training | 5 | 1.2 |
| Has Watched Online Guides & Videos | 3 | 0.7 |
| Has Attended All Available | 3 | 0.7 |
| Unaware of Any That Pertain To Them Specifically | 2 | 0.5 |
| "Inconvenient" | 2 | 0.5 |
| Haven't had the Opportunity Yet | 2 | 0.5 |
| Insufficient District Travel Funds | 1 | 0.2 |
| Employer Has Not Offered | 1 | 0.2 |
| Have EXC Report for Us | 1 | 0.2 |
| Total | 429 | 100.0 |

2.11 Training Effectiveness

To evaluate the effectiveness of the training, respondents were asked the following two questions about each training session they attended:

1. How much did attending the training session improve your understanding of the topic?
2. Please rate the usefulness of the resources and information provided to you during your training session?

Nearly half of all survey participants reported the training they attended “improved” their understanding of the applicable training topic for all sessions. Greater than 90% of respondents indicated “improved” understanding for each session, but roughly one-fifth of respondents reported great improvements from training. Training improvement level results were comparable across all training types (Figure 16). TRS training sessions continue with limited attendance, but REs who attend trainings find them useful in improving understanding, but not extremely useful (Figure 17).

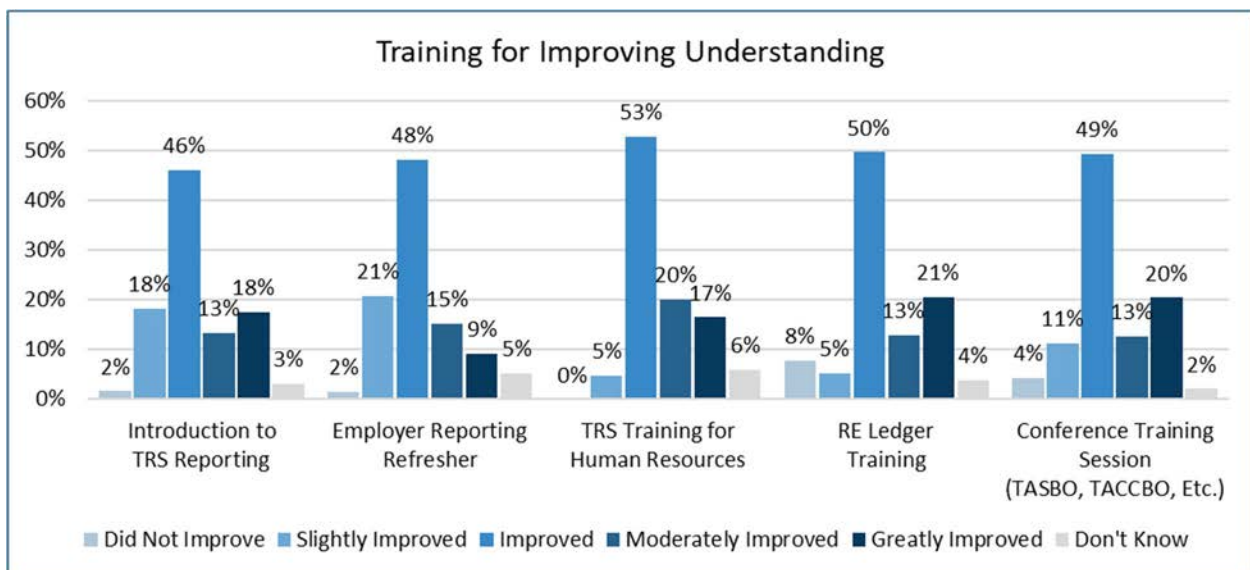


Figure 16: Training for Improving Understanding

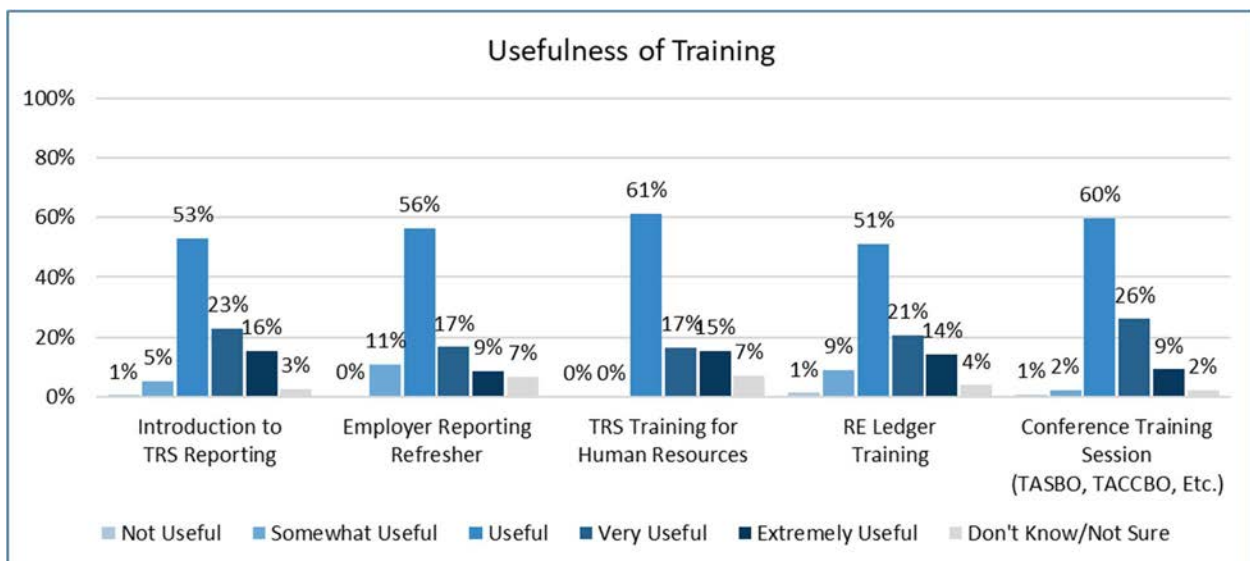


Figure 17: Usefulness of Training

REs who attend trainings find the resources used since the last training helpful, but not extremely helpful (Figure 18).

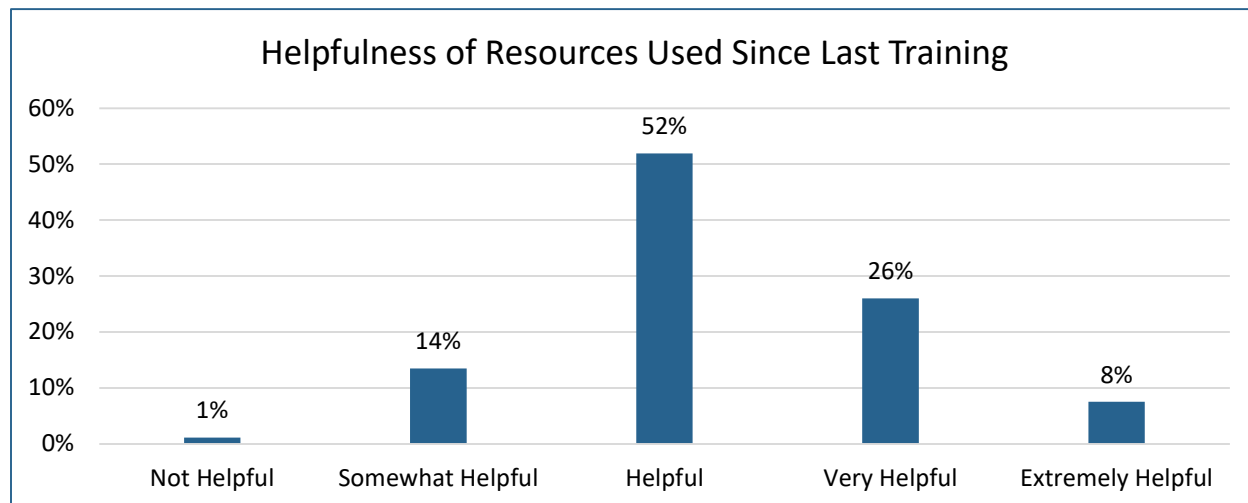


Figure 18: Helpfulness of Resources Used Since Last Training

2.12 Evaluations of TRS Resources

Respondents indicated which resources they used and how helpful they found each resource. Figure 19 details the frequency of resources used. The most frequently selected resource was an update to the 2023 survey, “TRS Emails” (N=722). Subsequent responses were consistent with previous years regarding frequency of being selected. Respondents reported using the “*Update Newsletter*” second-most frequently (N=654) followed by the “Payroll Manual” (N=601), “Errors/Warning List” (N=407), and “RE Portal Web Message” (N=378). The least frequently used resources are the “RE Portal Training Videos” (N=159) and the “File Formatting Guide” (N=55).

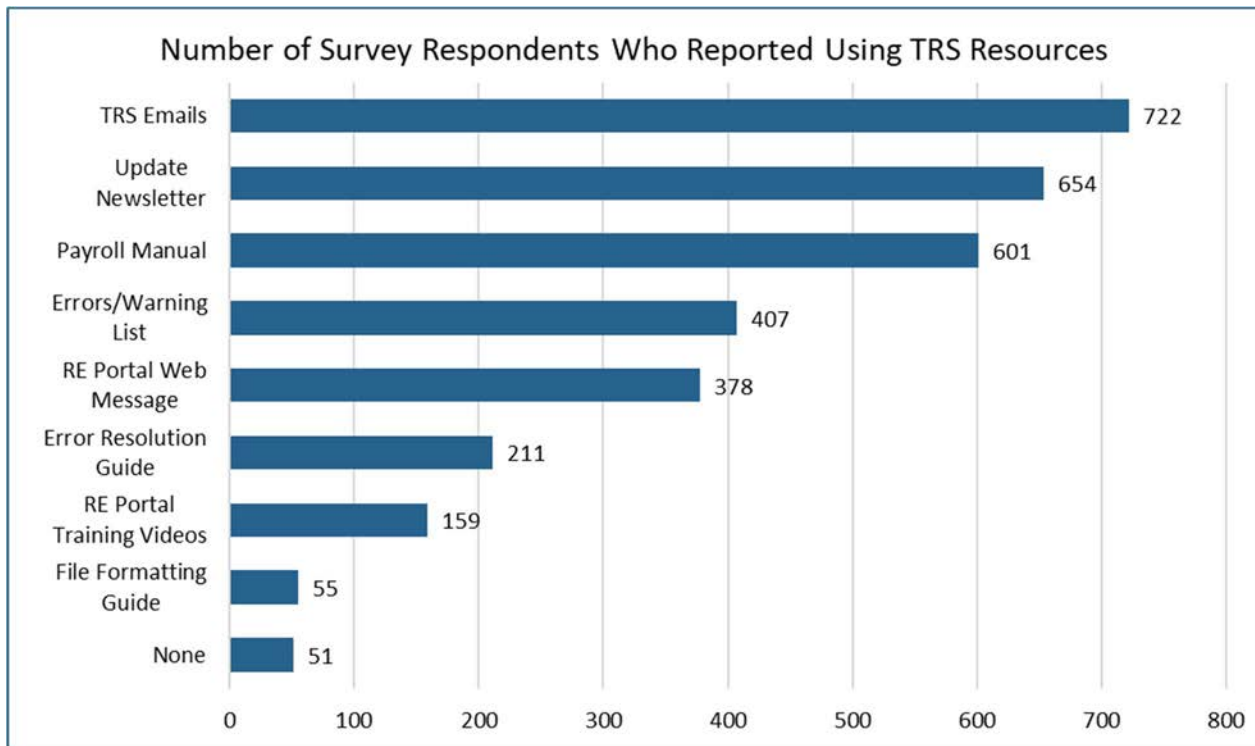


Figure 19: Number of Respondents Reporting Using TRS Resources

Survey respondents were then asked about their satisfaction with those resources they reported using. Overall, REs were generally satisfied with the resources, but not very satisfied with the resources (Figure 20). The largest group of respondents selected “satisfied” for each resource, generally approximately half of all respondents. Very few respondents consider any resources not helpful or not at all helpful. The largest group of very satisfied respondents were very satisfied with TRS emails (41%) and *Update Newsletter* (41%). Similarly sized groups were neutral (38%) and satisfied (38%) regarding the usefulness of the File Formatting Guide. Other than this guide, more than two-thirds of all respondents rated some level of satisfaction with all other resources. Longitudinal comparisons are not appropriate due to different scales historically regarding helpfulness which were updated to examine satisfaction levels in an effort to gain more detail and distinction in comparisons. Quick review does reveal significantly lower “very satisfied” rates compared to historical “very helpful” rates in previous years suggesting the revised scale provides increased granularity regarding the evaluation of resources.

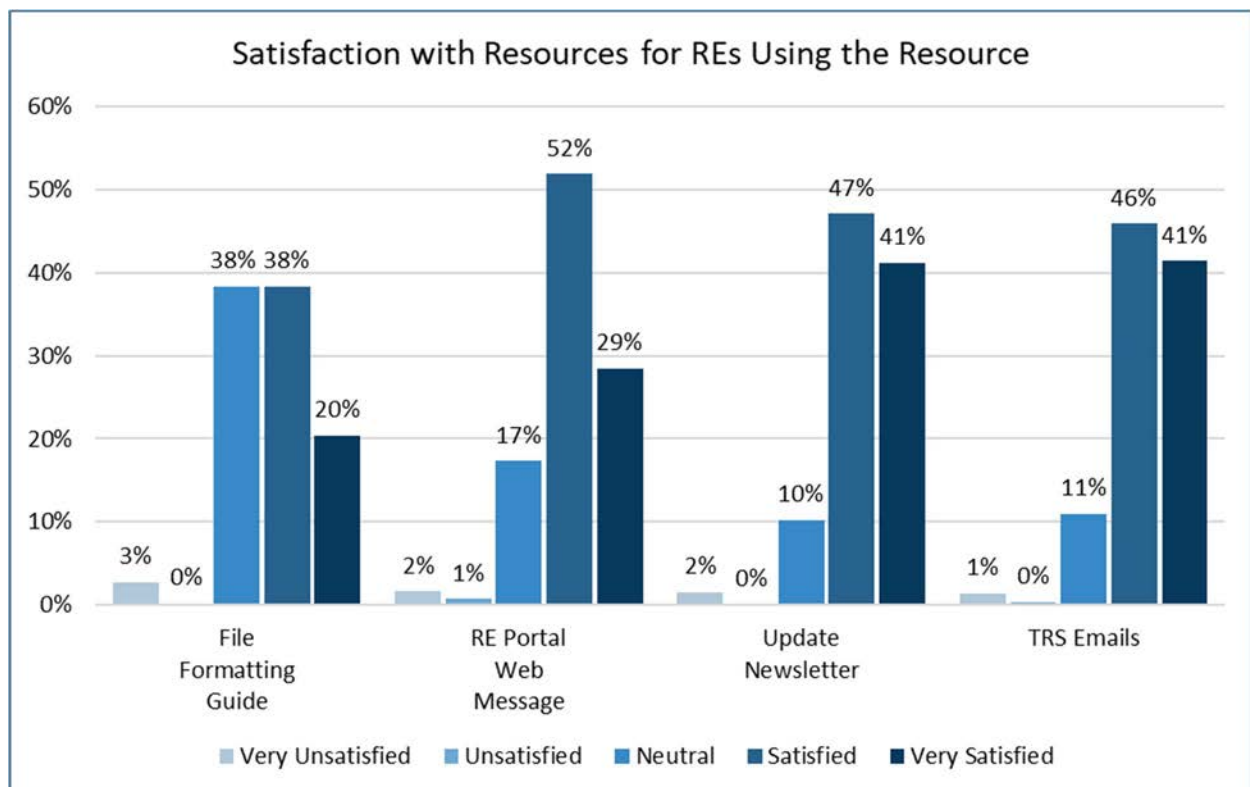
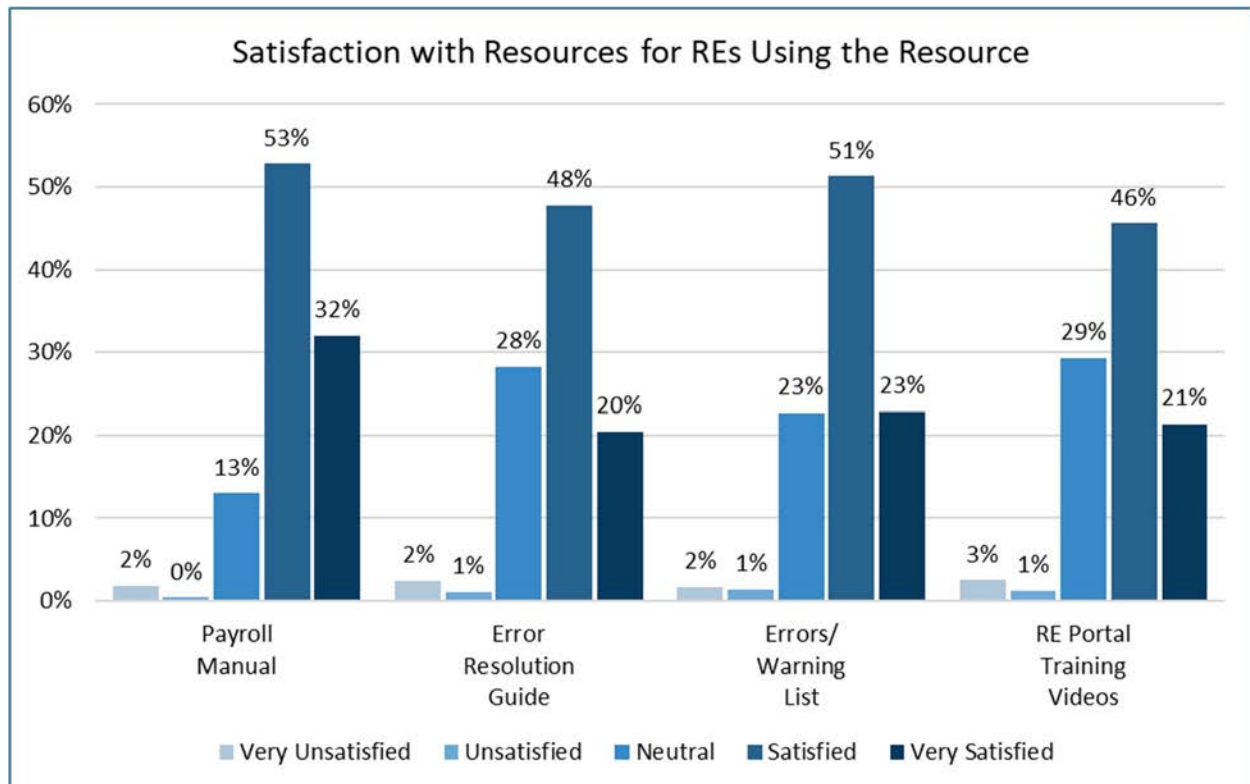


Figure 20: Helpfulness of Resources for REs Using the Resource

2.13 Preference for Receiving Training Materials

Respondent preferences for receiving material are presented in Figure 21 comparing the recent years. Format preferences are comparable to previous years, with a reduced range in minimum and maximum values between the four preference options compared to the previous two years. When asked how survey participants prefer to receive training materials, respondents reported a slight preference for “Live online interaction/Webinar” (28%), followed by “Written Online” (27%), “In-Person” training (23%), and “Recorded Videos” (19%). Each of the past two years reflect a small increase in preference for in-person training.

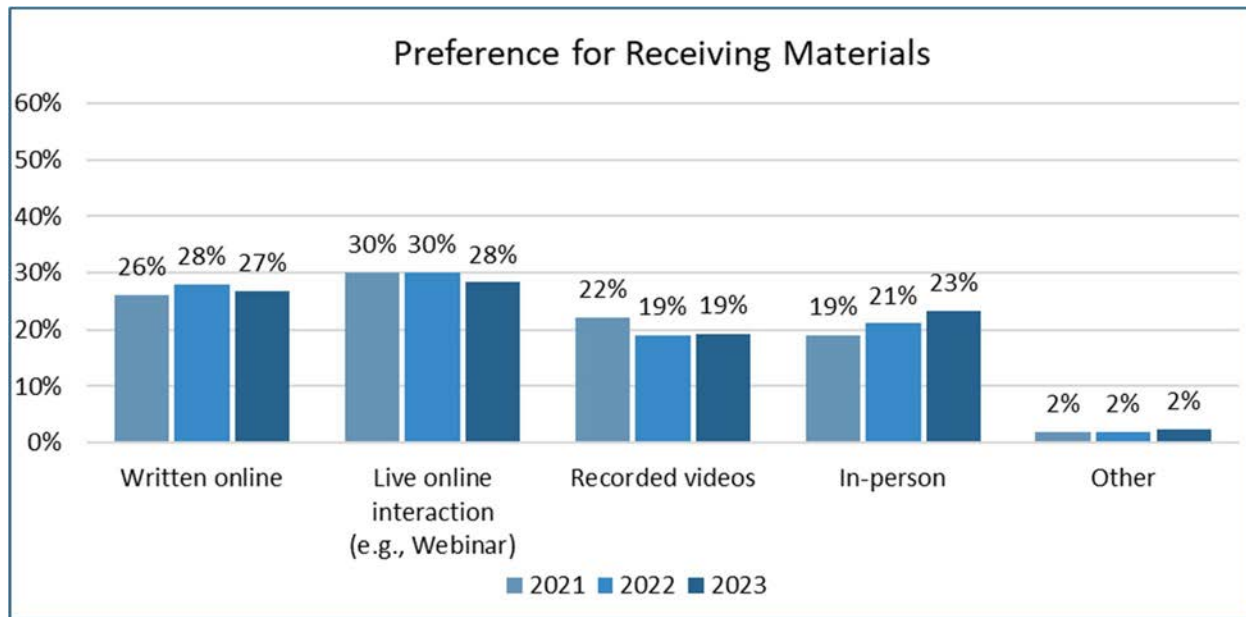


Figure 21: Preference for Receiving Materials

Figure 22 reveals that the majority of REs who attend trainings rate the resources used since the last training only as “helpful”. Roughly one-third (34%) of respondents report the resources to be very or extremely helpful, with fewer than one in ten indicating the highest level of helpfulness (8%).

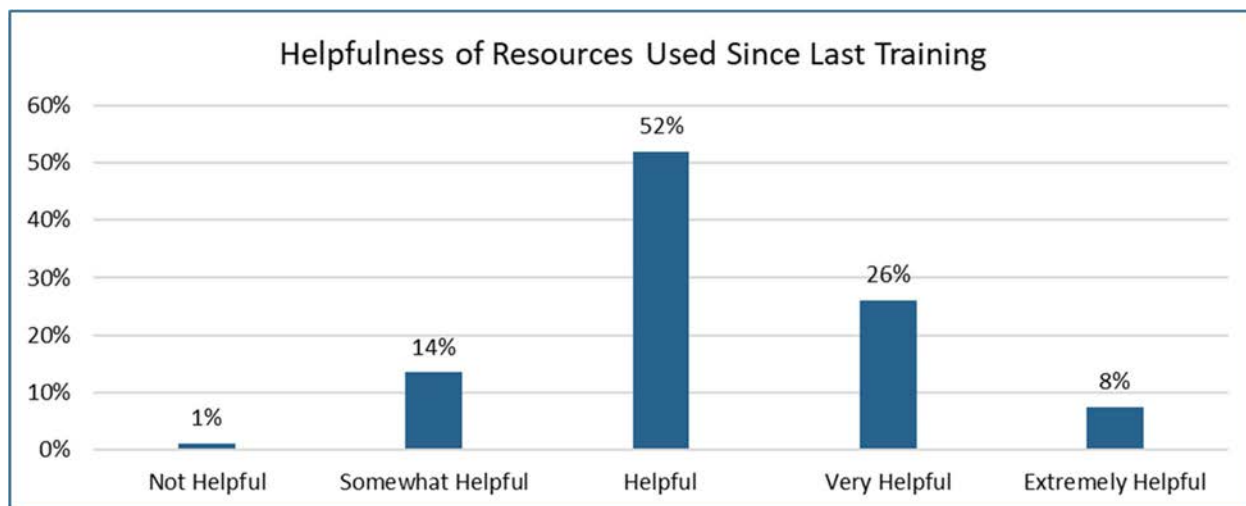


Figure 22: Helpfulness of Resources

2.14 Ratings for TRS Communications and the Reporting Employer Portal

Respondents were asked to evaluate TRS communications and the RE Portal in 2022. These questions were expanded in 2023 to include individual questions for each dimension of communication: communications, toll-free telephone access, call transfers, access to a live person, letters, electronic mail, Portal ease of use, Portal access to information (Figures 23a – 23g).

Ratings for TRS Communications and the RE Portal generally mirror the ratings for TRS services overall and RE experiences with the agency. REs generally rate they are satisfied with TRS communications (51%), but not “very satisfied” (28%). Similarly, 78% of respondents report combined satisfaction with both dimensions of the portal rating with just over one-quarter of respondents reporting being “very satisfied” with each dimension of the portal (Ease of Use: 29%; Access to Information: 28%). The smallest group of very satisfied respondents report being “very satisfied” with call transfers (19%), but the majority of respondents are “satisfied” with this communication and all others. Email communication received the largest group of extremely satisfied ratings (33%) and highest overall combined satisfaction levels (84%).

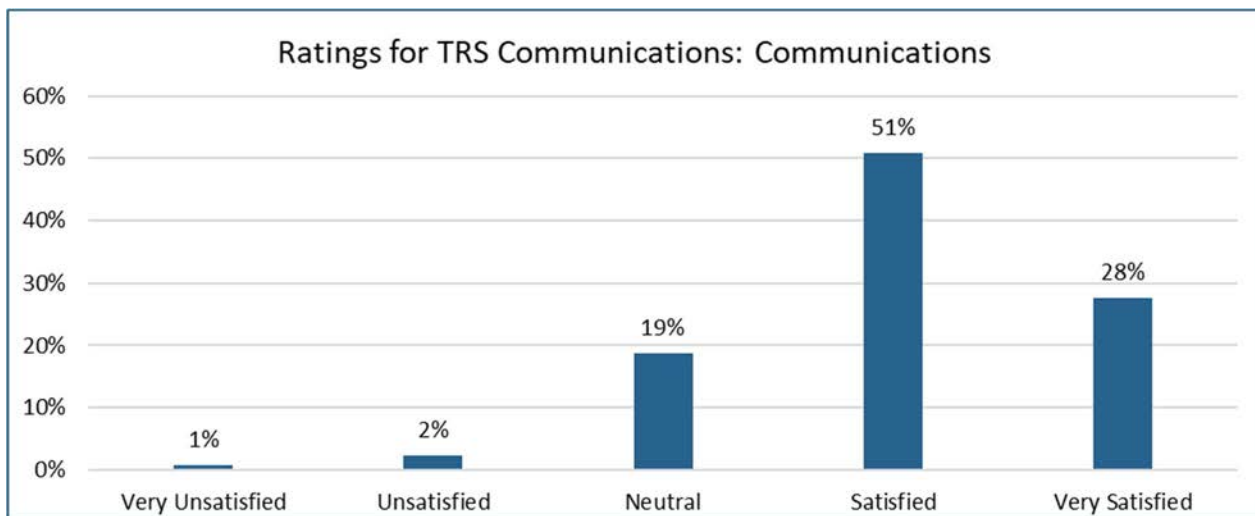


Figure 23a: Ratings for TRS Communication

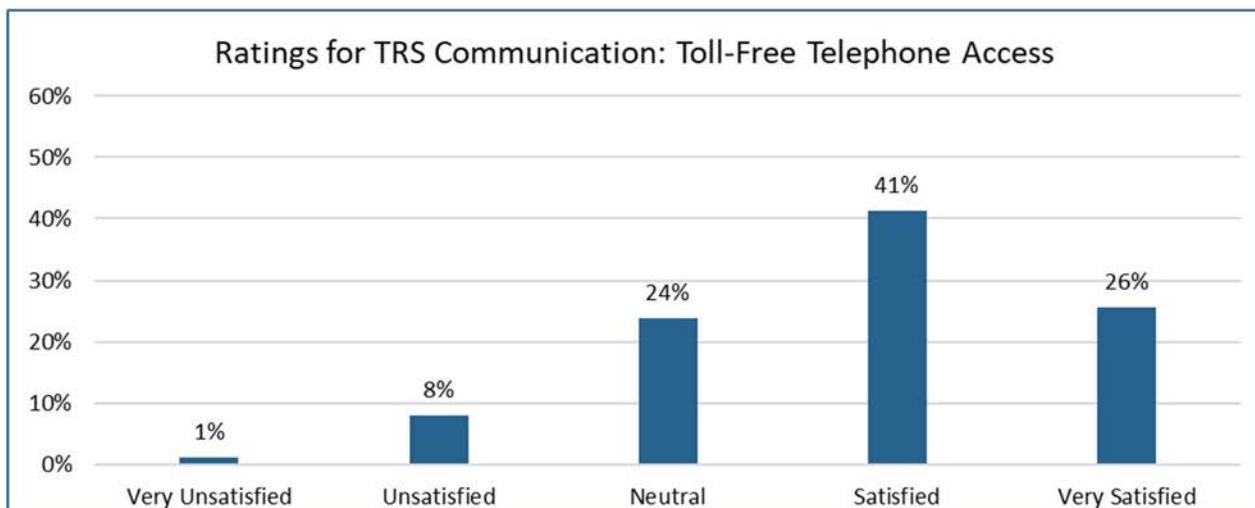


Figure 23b: Ratings for TRS Toll-Free Telephone Access

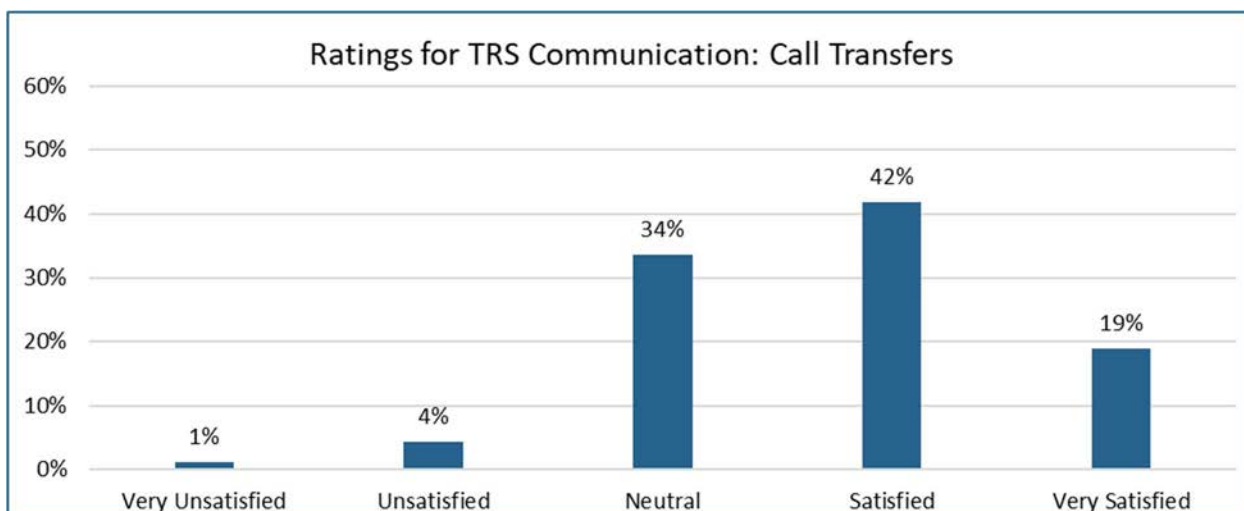


Figure 23c: Ratings for TRS Call Transfers

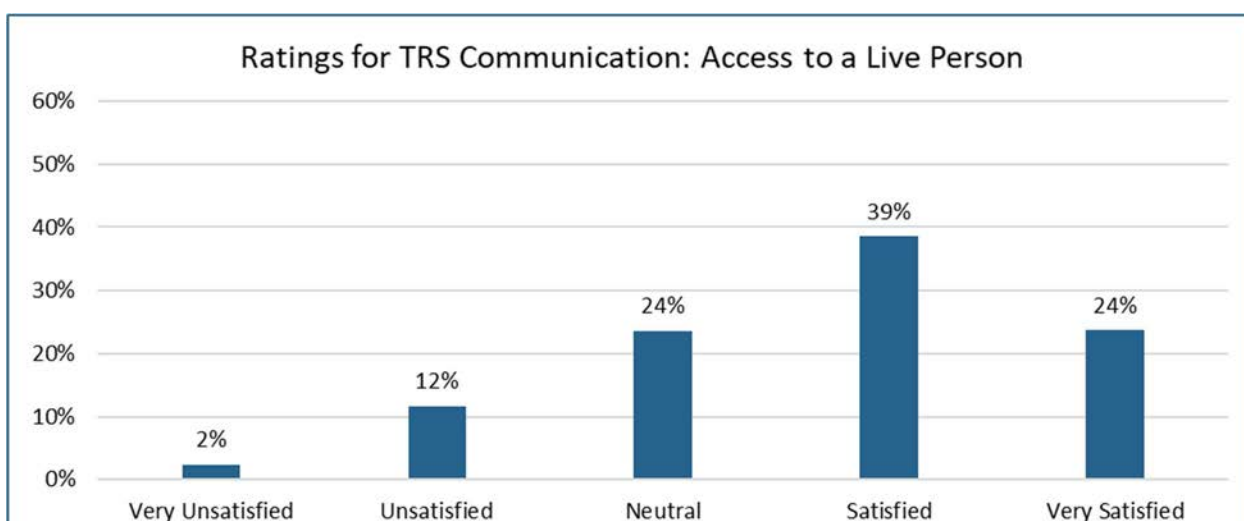


Figure 23d: Ratings for TRS Access to a Live Person

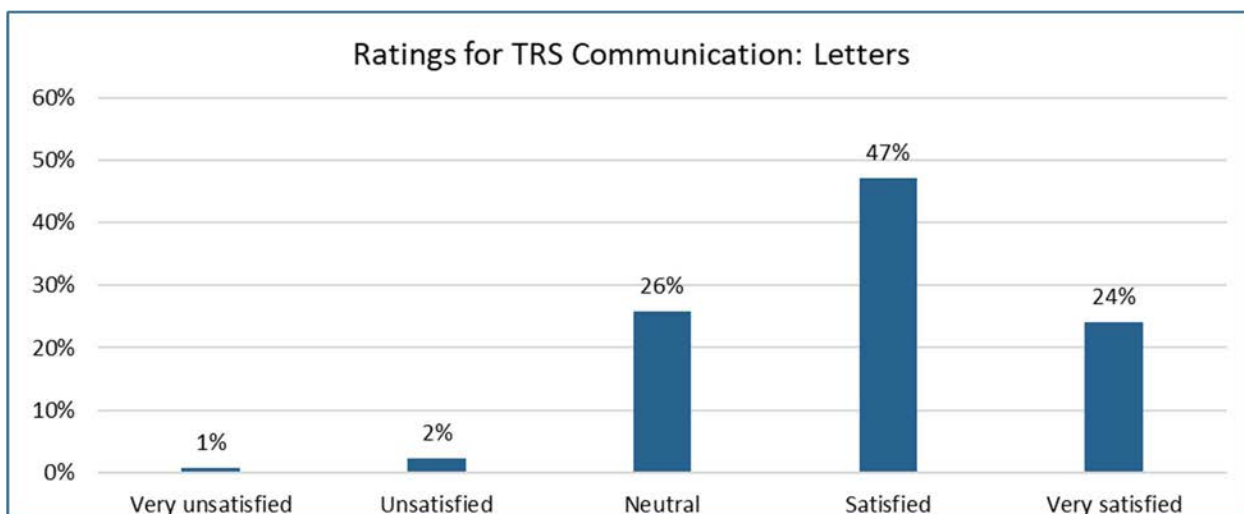


Figure 23e: Ratings for TRS Letters

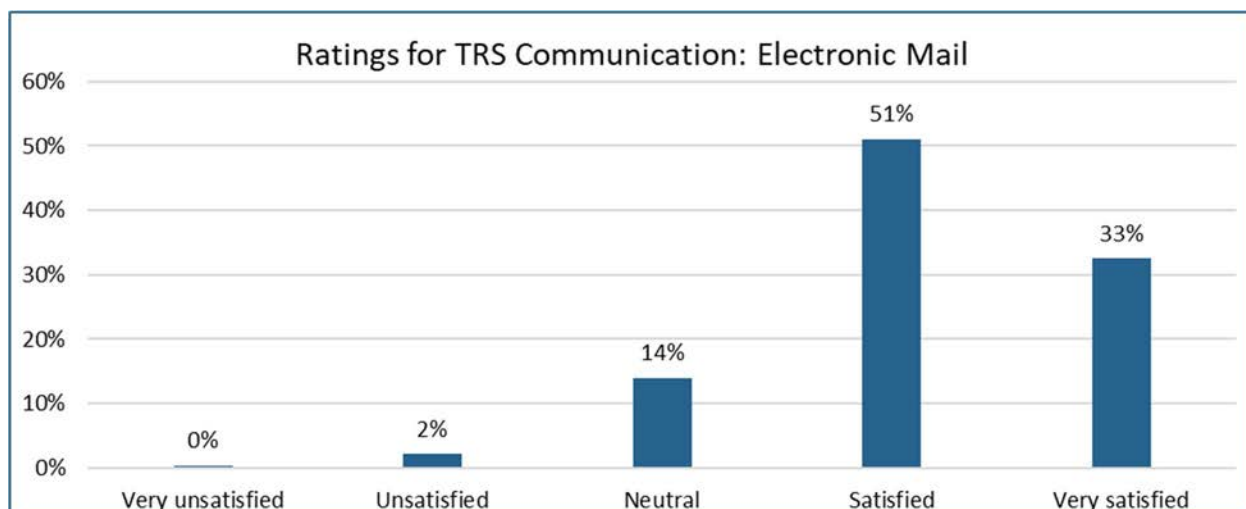


Figure 23f: Ratings for TRS Electronic Mail

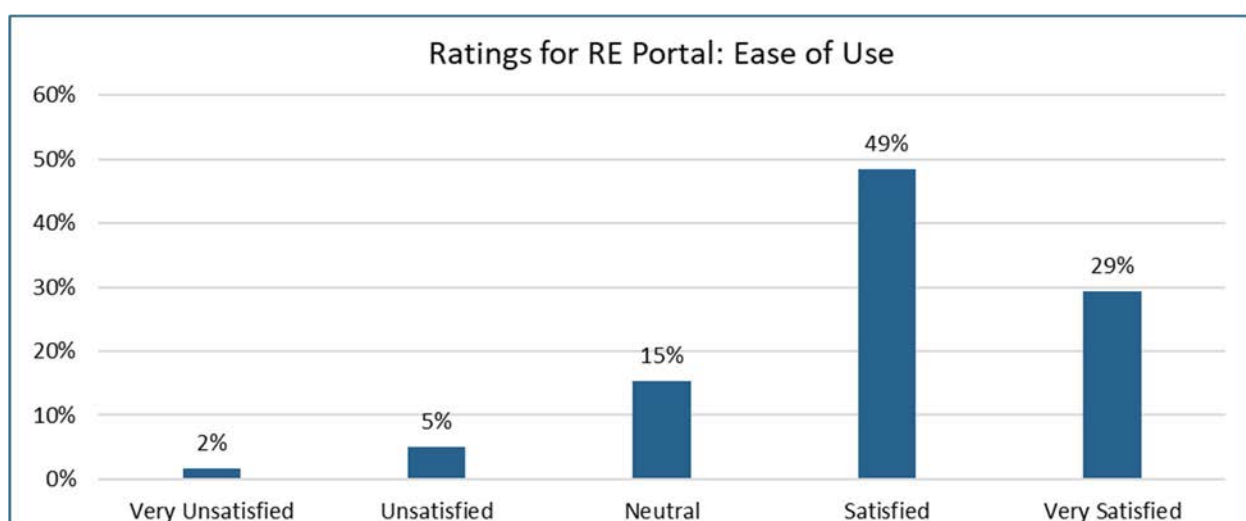


Figure 23g: Ratings for RE Portal: Ease of Use

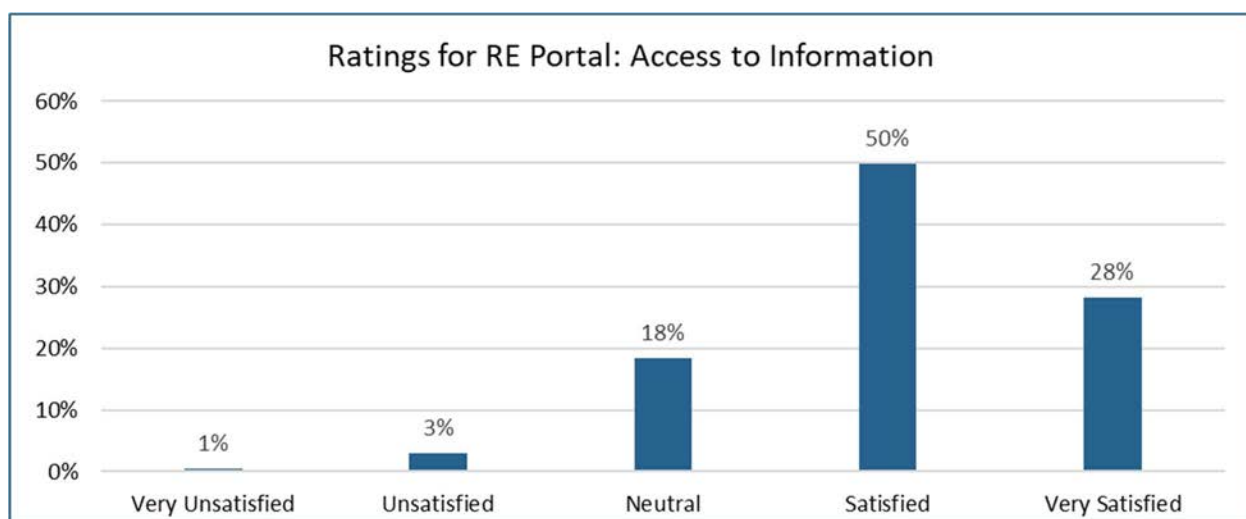


Figure 23h: Ratings for RE Portal: Access to Information

2.15 Awareness, Use, and Evaluations of the Employer Toolkit

RE Coaches are working to increase the awareness and utility of the Employer Toolkit provided to assist REs in their work. These questions work in sequence. The first question asked respondents whether they are aware of the Employer Toolkit and, if so, where they learned about it, and if they have used the Employer Toolkit. Figure 24 presents the results for awareness and use. Roughly a third of REs reported that they were aware of the Employer Toolkit in 2022, but that number has dropped to only one-quarter aware of the toolkit (26%) in 2023.

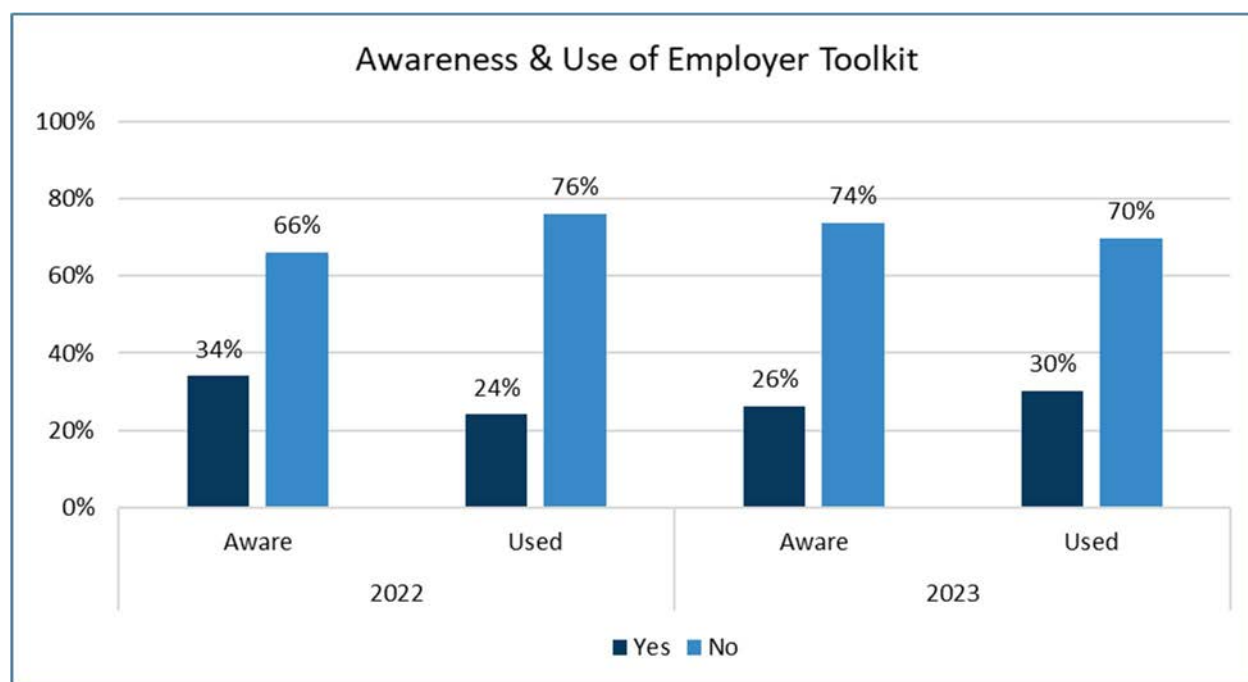


Figure 24: Awareness & Use of Employer Toolkit

Of those respondents, 30% reported having used the Employer Toolkit. When asked where they learned about the Employer Toolkit (Figure 25), the largest group reported learning about it through the *Update* Newsletter. Fewer respondents reported learning about the Employer Toolkit through email in 2023 (20%) compared to 2022 (30%). Responses were split approximately evenly across email, RE Portal and the *Update* Newsletter in 2022, but in 2023 the newsletter was the clear best source for increasing RE awareness. REs who use the Employer Toolkit generally find it helpful or very helpful (Figure 26).

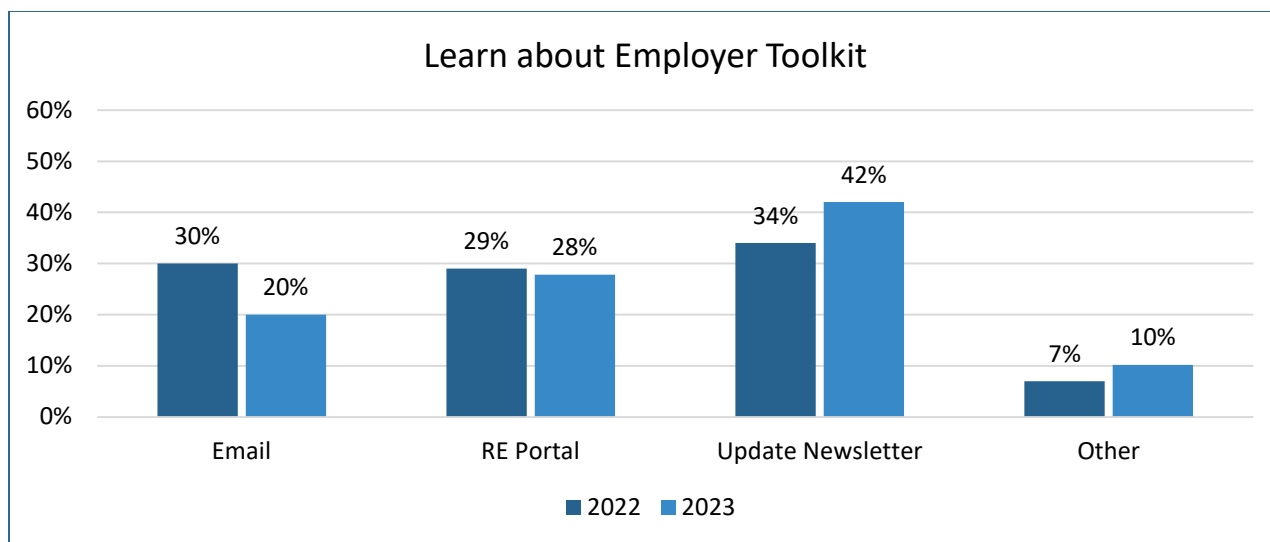


Figure 25: Learn about Employer Toolkit

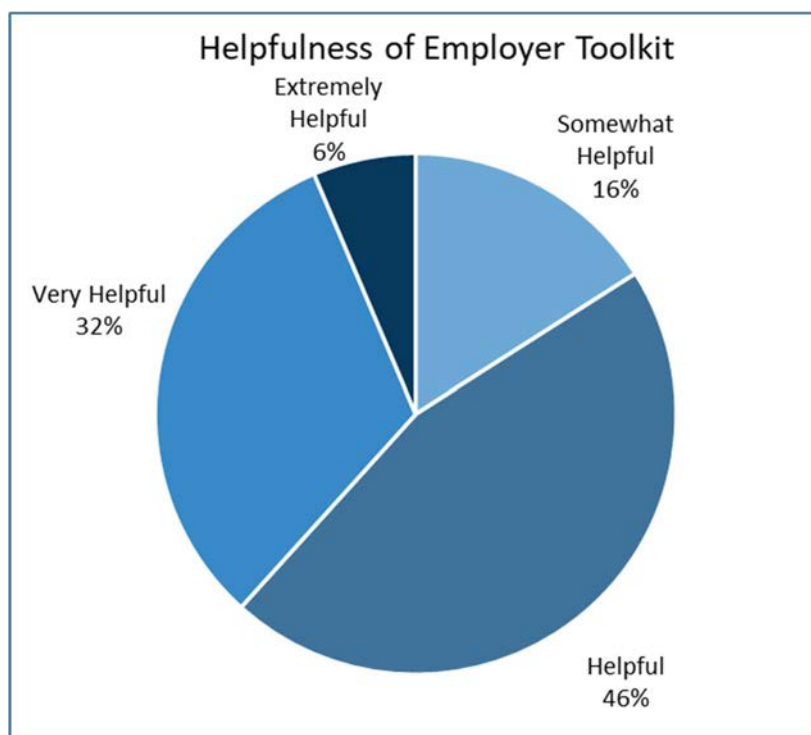


Figure 26: Helpfulness of Employer Toolkit

2.16 Open-Ended Comments

At the end of the survey, respondents were offered the opportunity to provide open-ended comments to the following two questions:

1. “What is the single most important thing TRS could do to improve its relationship with its Reporting Employers?”
2. “Is there anything else about your organization’s work with TRS that you would like to tell us that is not covered elsewhere in this survey?”

Responses were coded based on the earlier coding system and reinforced earlier themes. Open-ended responses for how TRS could improve its relationship with its REs are presented in Table 4.

Table 4. Coded Open-Ended Responses of the Most Important Thing TRS could do to Improve Its Relationship with Reporting Employers

What is the single most important thing TRS can do to improve its relationship with REs?

| Response Category | Count | % |
|---|-------|------|
| Improve Response Time | 105 | 18.1 |
| Improve Response (Availability) | 79 | 13.6 |
| Extend deadlines | 78 | 13.5 |
| Improve Communication | 57 | 9.8 |
| Provide training | 54 | 9.3 |
| In-person training | 9 | 1.6 |
| Improve quality of training | 6 | 1.0 |
| More training for coaches | 3 | 0.5 |
| Online training / webinars | 2 | 0.3 |
| Requests training material (add & update; archive of previous training) | 2 | 0.3 |
| Training in more regions | 2 | 0.3 |
| Improve portal | 41 | 7.1 |
| Improve understanding | 35 | 6.0 |
| Provide additional ways to communicate / live support / chat | 30 | 5.2 |
| Simplify process | 17 | 2.9 |
| Allow more access to documents & employee details | 15 | 2.6 |
| Keep grace periods & remove penalties | 13 | 2.2 |
| More coaches / overworked / less changeover | 9 | 1.6 |
| Reduce system downtime / optimize update schedule | 6 | 1.0 |
| Compliment - Specific Coach | 4 | 0.7 |
| Accuracy/match of information | 4 | 0.7 |
| Assigned too many coaches | 3 | 0.5 |
| Provide specific situational solutions | 3 | 0.5 |
| More autonomy | 1 | 0.2 |
| Prior year adjustments should be done by TRS | 1 | 0.2 |
| Total | 579 | |

Responses were coded into 25 categories. The categories identified were based both on previous year's survey results and our close reading of the responses in the 2023 survey. In Table 4, we present the number of open-ended comments coded to each category in the individual responses. It is important to note that each percent represents the percentage of survey respondents who answered this question rather than the percentage of total survey respondents. The most common coded categories included: (1) improve response times, (2) improve response availability, (3) extend deadlines, (4) improve communication, and (5) provide training.

Of the open-ended responses, several categories were similar to those expressed in previous years. Eighteen percent of respondents (18.1%) who offered a comment noted the need for quicker response times and 13.6% noted the need to improve response/availability. Respondents also stated that extending deadlines (13.5%) and communication needs to be improved (9.8%). A related theme that emerges in some comments is the need for TRS to provide training (13.5%), including in person training, improve the quality of training, offer more training for RE Coaches, provide online training/webinars, training materials, and training in more regions. Representative comments of the five most common themes are included below.

2.16a Improve Response Times

- *Continue to respond as quickly as possible. We have to deal with a short window to get reports completed. If there is a delay in getting help, that can be a problem.*
- *Continue to respond in a timely manner and provide help/steps on completing errors.*
- *Continuing to provide quick responses from coaches*
- *Decrease the response time on issues and overrides. Also, the ability to open a new window to look at staff information within the portal would be amazing!!*
- *Expedite overrides.*

2.16b Improve Response (Availability)

- *Be available and understand the current software Texas schools are using*
- *Be available by 1. Chat...2. Phone*
- *Be available during the first 6 days of the month to resolve issues with reports so we can complete the reports before payment. When there is a holiday, extend the deadline.*
- *Be available for assistance by phone. Communication is limited when done strictly by email.*
- *Be more accessible, both in problem resolution and in offering workshops for people who can't easily commute to Dallas, Houston or Austin.*

2.16c Extend Deadlines

- *Base reporting deadlines on district size -Extend the reporting deadlines -Simplify the overall reporting criteria -Continue grace periods -Reconsider deadlines based on all the variables districts have to incorporate into the submissions*
- *Be available during the first 6 days of the month to resolve issues with reports so we can complete the reports before payment. When there is a holiday, extend the deadline.*
- *Be patient! We do not have enough people, either! Keep extending the grace period, please.*

- *Be realistic in the reporting expectations. But also, QUIT DOING SCHEDULED MAINTENANCE ON THE PORTAL DURING REPORTING TIMES. Especially when the 6th is a Sunday, which means reporting has to be done by Friday the 4th (or if the 6th is a Monday holiday then reporting is due on the 3rd). By the 3rd/4th of the month we have not received timesheets yet.*
- *Being aware that sometimes the due dates fall over weekends or holidays and there are no allowances made to the payment due dates. Before the reporting due date extensions, meeting the report deadlines was a challenge. Because your website is not accessible after 7 PM, it causes hardships in getting reporting done on time when we have our regular jobs to do. It would be a huge help for the reporting employers to have evening access to the TRS website. Would it be possible to move the update time on your website to 10 PM or later?.*

2.16d Improve Communication

- *Communication & detailed information step by step & not leaving us in trying to figure out what our coach just emailed.*
- *communication and access to coaches that are helpful. My coach Nathan Farmer is awesome--- he always responds quickly and explains in a manner I can understand*
- *Communication and easier access to a live person.*
- *Communication and not to make us feel stupid.*
- *Continue to communicate and collaborate with districts. Build consistency where possible, so we can keep at least a toe or two on the ground while navigating what has to change.*

2.16e Provide Training

- *Conduct more frequent trainings so new staff can understand TRS and be able to report.*
- *Continue to improve online resources. Have trainings at each ESC. Continue to have online trainings/videos.*
- *Continue with the refresher trainings, it not only reminds us of the correct way to report but it also allows us to interact and ask questions.*
- *I would like to have a training were we could interact with one another and be able to ask questions on how to handle different situations.*
- *I would love if you could put a TRS webinar or something so that beginners knew where to start -*
- *Improved training and resources on error clearing and prevention.*
- *Schedule more than one workshop per year or make a recording of it available when you have to miss.*
- *Any kind of basic training for someone coming into this position that was not trained by the previous employee.*
- *Having training videos readily available for employees new in their position. Reporting, error resolution, and even an overview of what each of the payment items are and what they are calculated on.*

Open-ended responses for anything else about their organization's work with TRS that they would like to tell TRS that is not covered elsewhere in this survey are presented in Table 5.

Table 5. Coded Open-Ended Responses of Anything Else about Their Organization's Work with TRS that They Would Like to Tell TRS That is Not Covered Elsewhere in This Survey

Is there anything else about your organization's work with TRS that you would like to tell us that is not covered elsewhere in this survey?

| Response Category | Count | % |
|--|-------|-------|
| Improve report process - deadlines & penalty fees | 43 | 22.3 |
| Improve website/software navigation & function, search, ability to open a second window, make it harder to mistakenly delete | 26 | 13.5 |
| Improve communication/ availability/response time from coaches | 18 | 9.3 |
| Improve report process - procedure | 16 | 8.3 |
| Extend system access | 11 | 5.7 |
| More training, updated, in person, captioning | 11 | 5.7 |
| Addressing errors - process | 10 | 5.2 |
| Improve Texnet payment | 4 | 2.1 |
| Hire more coaches. They're spread too thin | 4 | 2.1 |
| Report TRS eligible employees only, not part-time | 3 | 1.6 |
| Improve onboarding process, easier to return to work | 2 | 1.0 |
| Change when maintenance is run | 2 | 1.0 |
| Improve communication between districts; networking | 2 | 1.0 |
| Extend time between changing passwords | 2 | 1.0 |
| Holidays & working hours | 2 | 1.0 |
| Quarterly q & as | 2 | 1.0 |
| Overwhelmed & feel like management is working against them | 2 | 1.0 |
| No special treatment for EAG group | 1 | 0.5 |
| Additional resources | 1 | 0.5 |
| Payment timeline confusing | 1 | 0.5 |
| Positive comment about a specific coach | 19 | 9.8 |
| Positive comment | 11 | 5.7 |
| Total | 193 | 100.0 |

Responses were coded into 22 categories. The categories identified were based both on previous year's survey results and our close reading of the responses in the 2023 survey. In Table 5, we present the number of open-ended comments coded to each category in the individual responses. It is important to note that each percent represents the percentage of survey respondents who answered this question rather than the percentage of total survey respondents. The most common coded categories included: (1) Improve report process - deadlines & penalty fees, (2) Improve website/software navigation & function,

search, ability to open a second window, make it harder to mistakenly delete, (4) Improve communication/availability/ response time from coaches, (4) Improve report process - procedure.

Twenty-two percent of respondents (22.3%) who offered a comment noted the need to improve report process - deadlines & penalty fees. Respondents also stated the need to improve the website/software navigation & function, search, ability to open a second window, make it harder to mistakenly delete (13.5%) and communication needs to be improved (9.3%). A related category that emerges in some comments is the need to improve report the process and procedures (8.3%), including in person training, improve the quality of training, offer more training for RE Coaches, provide online training/webinars, training materials, and training in more regions. Representative comments of the four most common themes are included below.

2.16f Improve Report Process - Deadlines & Penalty Fees

- *Again, giving the RE's until the 10th of each month to submit all reports would be very helpful. We run payroll twice a month and there won't be much time between the end of the month payroll and the 6th to get ED and RP records completed. If nothing else, switch to have the ER records due on the 6th and the ED and RP records due on the 10th.*
- *At this point it would be impossible for us to meet the 6th of the month rule to complete all reporting (payments by 6th is ok), especially the TRS Payroll Report. Most of the time it takes over 1 week to confirm the change of an employee's TRS eligibility status due to work at another institution, to gain the info from the employee and from the other institution. In addition, it usually takes over 1 week to have any overrides processed by TRS. The communication average of 48 hours between any e-mail is too long once questions for the override require more answers. Therefore, it would not be possible to meet the deadline of the 6th to reach completed status for reports. The 16th of each month would be more realistic/reasonable.*
- *Concern of discontinuance of grace period. Given the abundance of information to process within the week after the month end is impractical especially for large districts with over 2,000 employees. Currently the time we have now ensures accuracy in our reporting. Additionally, the resulting fees assessed for missed deadlines is a burden for poor districts.*
- *Considering to adopt the grace period going forward. The amount of data analysis needed in order to provide accurate monthly reporting to TRS is extensive and along with other duties that need to be completed at RE Entities it is not reasonable to require reports be completed by the 6th of every month.*
- *Due to software issues reporting in months worked not months paid, information has to be updated manually before submitting files therefore the grace period is needed for our district to meet the submissions deadline.*
- *Extend TRS Reporting Deadlines to the 20th of the following month.*

2.16g Improve Website/Software Navigation & Function

- *Could you have a way to do like a google search for questions? Just trying to find where to look is quite frustrating sometimes, so if I could just type my question to search somewhere might be nice.*
- *Easier navigation on website and better search tools*
- *Everyone is so helpful, informed and friendly. We do appreciate all of the efforts. The software errors just require a lot of time and effort with little turn around time after the end of the month.*

- *I had an incident where a teacher was miss reported on days she worked the 1st year she came to work for our entity, due to a software issue and TRS would not give her the year of service so she had to come back and work another year in order to retire. That makes me as a employer reporting very nervous because we have over 9000 employees and its hard to catch something when our software comes up with an incorrect amount of days.*
- *I wish it was a little easier to jump around in the the reporting portal. Maybe if there was a back button that would take you to a previous screen instead of to the home page.*
- *if the TRS system would have a place that was populate the information if an employee is working at another TRS entity.*

2.16h Improve Communication/Availability/ Response Time from Coaches

- *Be available during the first 6 days of the month to resolve issues with reports so we can complete the reports before payment. When there is a holiday, extend the deadline.*
- *Having TRS Portal open longer, most often times I can't get to TRS until after hours - which means I really only have an hour to work each night. I think this is the most important issue for me. Rarely do I use Coach support, but I would rate this higher than a quick turner around for coach response.*
- *I have tried to keep a more hands off approach with TRS. I don't want to contact them unless absolutely necessary because it's very frustrating.*
- *I need to be able to get my questions answered sooner.*
- *I usually do not know there is a problem until I go to submit all my reports and deposits so the pentalties should not start until 2 weeks after the due date since noone is avaiable to answer the phone and it takes 2 days to reply to emails which usually leds to 2 or 3 more emails. I understand that the coaches get busy but I would like a little grace as well. Again we are a small school and I am the receptionist as well as the business manager, human resources, admin assistant, I can not always be avaiable when you are.*

2.16i Improve Report Process - Procedure

- *Like other educational organizations we experience budgetary & resource constraints that may not allow us adequate staffing. We need all the help we can get to minimize the amount of time spent correcting errors and administrating our TRS files; the current process overall is extremely challenging, convoluted, and time consuming. We appreciate that you have requested feedback and are looking for ways to improve it.*
- *My biggest complaint is when trying to submit reports it takes SO LONG on the day before and day that reports are due.*
- *Once reports have been submitted it takes WAY too long for them to process. I have waited 2-3 hours for a single report to finish processing.*
- *We like the online certifications rather than mailing or faxing forms. Making the online cert to a two steps would be helpful. Payroll staff contact could complete the information and then reporting official with signature access would certify the data.*

Appendix A – TRS Reporting Employer Satisfaction Survey 2023

The Teacher Retirement System of Texas (TRS) wants to best understand the needs of Reporting Employers to continue to improve the information, resources, training, and services it provides. TRS has partnered with Elite Research to conduct the annual Reporting Employer Satisfaction Survey.

The survey should take approximately 10-15 minutes to complete. Survey responses are confidential and will only be used to help improve the information, resources, training, and services TRS provides to its Reporting Employers. Please provide your candid and honest feedback.

Please note: *The survey should be completed by the individual who submits reports to TRS. If you are not the person who submits reports to TRS, please send that individual's contact information to Melissa Belson at survey@eliteresearch.com.*

If you have any questions about the survey, please contact Melissa Belson with Elite Research by email (survey@eliteresearch.com) or phone (972) 538-1374.

By clicking the link below, you are agreeing to participate in the survey.

Thank you for participating in the 2023 TRS Reporting Employer Satisfaction Survey!

Overall, how would you rate the quality of service your organization receives from TRS?

- ☐ Poor
- ☐ Not so good
- ☐ Fair
- ☐ Good
- ☐ Excellent
- ☐ Don't know/Not sure

Display this question if the RE selects "Poor" or "Not so good".

You selected **"Poor"**. Please provide more detail on your unsatisfactory rating.

You selected **"Not so good"**. Please provide more detail on your unsatisfactory rating.

Please rate your overall experience with the agency.

- ☐ Very unsatisfied
- ☐ Unsatisfied
- ☐ Neutral
- ☐ Satisfied
- ☐ Very satisfied
- ☐ Not applicable

Display this question if the RE selects "Very Unsatisfied" or "Unsatisfied".

You selected **"Very unsatisfied"**. Please provide more detail on your unsatisfactory rating.

You selected **"Unsatisfied"**. Please provide more detail on your unsatisfactory rating.

What, if anything, would you change about the services TRS provides to its Reporting Employers?
(Please limit your response to 3000 characters.)

In a typical month, how often does your organization call or email a Reporting Employer Coach?

- ☐ Daily
- ☐ Regularly, several times a week
- ☐ Occasionally, about once every week
- ☐ Rarely, no more than once or twice a month
- ☐ Never

How would you rate your Reporting Employer Coach on:

| | Very unsatisfied | Unsatisfied | Neutral | Satisfied | Very satisfied | Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Courtesy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Friendliness | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Knowledge of TRS Reporting Requirements | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Knowledge of RE Portal | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Identifies themselves by name | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects "Very Unsatisfied" or "Unsatisfied".

You selected **"Very unsatisfied"** with one or more items above. Please provide more detail on your unsatisfactory rating.

You selected **"Unsatisfied"** with one or more items above. Please provide more detail on your unsatisfactory rating.

How would you rate the quality of service you receive from your Reporting Employer Coach?

- ☐ Poor
- ☐ Not so good
- ☐ Fair
- ☐ Good
- ☐ Excellent
- ☐ Don't know/Not Sure

Display this question if the RE selects "Not so good" or "Poor".

You selected **"Poor"**. Please provide more detail on your unsatisfactory rating.

You selected **"Not so good"**. Please provide more detail on your unsatisfactory rating.

When you do contact your Reporting Employer Coach, how would you rate them on:

| | Very unsatisfied | Unsatisfied | Neutral | Satisfied | Very satisfied | Not applicable |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Understanding your questions and responding appropriately | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Directing you to appropriate resources on the website | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Explaining the steps needed to correct reporting errors | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Responding to your initial question within the current service standard (2 business days) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Resolving your initial question within 2 business days | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Being available so you can speak to a person on the phone | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Communicating via email | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects “Very unsatisfied” or “Unsatisfied”.

You selected “**Very unsatisfied**” with one or more of the items above. Please provide more detail on your unsatisfactory rating.

You selected “**Unsatisfied**” with one or more of the items above. Please provide more detail on your unsatisfactory rating.

How important is it to you that your Reporting Employer Coach:

| | Not important | Slightly important | Important | Moderately important | Very important | Don’t know/ Not Sure |
|---|-----------------------|-----------------------|-----------------------|-------------------------|-----------------------|-------------------------|
| Understands your questions and responds appropriately | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Directs you to appropriate resources on the website | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Explains the steps needed to correct reporting errors | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Responds to your initial question within the current service standard (2 business days) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Resolves your initial question within 2 business days | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Is available so you can speak to a person on the phone | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Communicates via email | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

If online chat was offered as another way to communicate with your Reporting Employer Coach, how often would you use it?

- ☐ Not at all
- ☐ Occasionally
- ☐ Frequently
- ☐ All the time
- ☐ Don't know/Not sure

Please rank the three most important things your Reporting Employer Coach can do for you and your organization. *(Click on the individual statements you consider most important and drag them into the box. The first statement in the box should be the statement you consider most important.)*

Three Most Important

- _____ Understands your questions and responds appropriately
- _____ Directs you to appropriate resources on the website
- _____ Explains the steps needed to correct errors
- _____ Responds within the current service standard of 2 business days
- _____ Is available so you can speak to a person on the phone
- _____ Communicates via email
- _____ Communicates via chat
- _____ Something else, please explain _____

TRS' goal is to respond to you within two business days. Do you think this timeline is reasonable?

- ☐ Yes
- ☐ No
- ☐ Don't know/Not sure

Display this question if the RE responds "No".

If no, what do you think is a reasonable response time? *(Please limit your response to 50 characters.)*

On average, how quickly does your Reporting Employer Coach respond to your organization's calls or emails?

- ☐ Within 24 hours
- ☐ Within 48 hours
- ☐ Within a week
- ☐ Within a month
- ☐ My Reporting Employer Coach rarely responds to calls or emails
- ☐ Don't know/Not sure

On average, how quickly does your Reporting Employer Coach resolve your issue?

- ☐ Within 24 hours
- ☐ Within 48 hours
- ☐ Within a week
- ☐ Within a month
- ☐ My Reporting Employer Coach rarely resolves my issue(s)
- ☐ Don't know/Not sure

In the past year, have you attended a TRS training session?

- ☐ Yes
- ☐ No

Display this question if the RE responds "No".

Briefly explain the reason why you did not attend an employer reporting training session in the past year. *(Please limit your response to 500 characters.)*

Display this question if the RE responds “Yes”.

Which training session did you attend? *(Check all that apply).*

- ☐ Introduction to TRS Reporting
- ☐ Employer Reporting Refresher
- ☐ TRS Training for Human Resources
- ☐ RE Ledger Training
- ☐ Conference Training Session (TASBO, TACCBO, Etc.)

Display this question if the RE selects "Introduction to TRS Reporting" as a session they attended.

How much did attending the **Introduction to TRS Reporting** training session improve your understanding of TRS reporting processes?

- ☐ Did not improve
- ☐ Slightly improved
- ☐ Improved
- ☐ Moderately improved
- ☐ Greatly improved
- ☐ Don't know/Not sure

Display this question if the RE selects "Did not improve" or “Slightly improved”.

You selected **“Did not improve”**. Please provide more detail on how TRS can improve the **Introduction to TRS Reporting** training session.

You selected **“Slightly improved”**. Please provide more detail on how TRS can improve the **Introduction to TRS Reporting** training session.

Display this question if the RE selects "Employer Reporting Refresher " as a session they attended.

How much did attending the **Employer Reporting Refresher** training session improve your understanding of Reporting Employer Portal functionality?

- ☐ Did not improve
- ☐ Slightly improved
- ☐ Improved
- ☐ Moderately improved
- ☐ Greatly improved
- ☐ Don't know/Not sure

Display this question if the RE selects "Did not improve" or "Slightly improved".

You selected **"Did not improve"**. Please provide more detail on how TRS can improve the **Employer Reporting Refresher** training session.

You selected **"Slightly improved"**. Please provide more detail on how TRS can improve the **Employer Reporting Refresher** training session.

Display this question if the RE selects "TRS Training for Human Resources" as a session they attended.

How much did attending the TRS Training for Human Resources session improve your understanding of the topic?

- ☐ Did not improve
- ☐ Slightly improved
- ☐ Improved
- ☐ Moderately improved
- ☐ Greatly improved
- ☐ Don't know/Not sure

Display this question if the RE selects "Did not improve" or "Slightly improved".

You selected **"Did not improve"**. Please provide more detail on how TRS can improve the **TRS Training for Human Resources** session.

You selected **"Slightly improved"**. Please provide more detail on how TRS can improve the **TRS Training for Human Resources** session.

Display this question if the RE selects "RE Ledger Training" as a session they attended.

How much did attending the **RE Ledger Training** session improve your understanding of TRS reporting processes?

- ☐ Did not improve
- ☐ Slightly improved
- ☐ Improved
- ☐ Moderately improved
- ☐ Greatly improved
- ☐ Don't know/Not sure

Display this question if the RE selects "Did not improve" or "Slightly improved".

You selected **"Did not improve"**. Please provide more detail on how TRS can improve the **RE Ledger Training** session.

You selected **"Slightly improved"**. Please provide more detail on how TRS can improve the **RE Ledger Training** session.

Display this question if the RE selects "Conference Training (including TASBO, TACCBO, etc.)" as a session they attended.

How much did attending the **Conference Training (including TASBO, TACCBO, etc.)** session improve your understanding of TRS reporting processes?

- ☐ Did not improve
- ☐ Slightly improved
- ☐ Improved
- ☐ Moderately improved
- ☐ Greatly improve
- ☐ Don't know/Not sure

Display this question if the RE selects "Did not improve" or "Slightly improved".

You selected **"Did not improve"**. Please provide more detail on how TRS can improve the **Conference Training (including TASBO, TACCBO, etc.)** session.

You selected **"Slightly improved"**. Please provide more detail on how TRS can improve the **Conference Training (including TASBO, TACCBO, etc.)** session.

Display this question if the RE selects "Introduction to TRS Reporting" as a session they attended.

Please rate the usefulness of the resources and information provided to you during the **Introduction to TRS Reporting** training session.

- ☐ Not useful
- ☐ Somewhat useful
- ☐ Useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not useful" or "Somewhat useful".

You selected **"Not useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Introduction to TRS Reporting** training session.

You selected **"Somewhat useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Introduction to TRS Reporting** training session.

Display this question if the RE selects "Employer Reporting Refresher" as a session they attended.

Please rate the usefulness of the resources and information provided to you during the **Employer Reporting Refresher** training session.

- ☐ Not useful
- ☐ Somewhat useful
- ☐ Useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not useful" or "Somewhat useful".

You selected **"Not useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Employer Reporting Refresher** training session.

You selected **"Somewhat useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Employer Reporting Refresher** training session.

Display this question if the RE selects " TRS Training for Human Resources" as a session they attended.

Please rate the usefulness of the resources and information provided to you during the **TRS Training for Human Resources** session.

- ☐ Not useful
- ☐ Somewhat useful
- ☐ Useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not useful" or "Somewhat useful".

You selected **"Not useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the TRS Training for Human Resources training session.

You selected **"Somewhat useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the TRS Training for Human Resources training session.

Display this question if the RE selects "RE Ledger Training" as a session they attended.

Please rate the usefulness of the resources and information provided to you during the **RE Ledger Training** session.

- ☐ Not useful
- ☐ Somewhat useful
- ☐ Useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not useful" or "Somewhat useful".

You selected **"Not useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the RE Ledger Training session.

You selected **"Somewhat useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the RE Ledger Training session

Display this question if the RE selects "Conference Training (including TASBO, TACCBO, etc.)" as a session they attended.

Please rate the usefulness of the resources and information provided to you during the **Conference Training (including TASBO, TACCBO, etc.)** session.

- ☐ Not useful
- ☐ Somewhat useful
- ☐ Useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not useful" or "Somewhat useful".

You selected **"Not useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Conference Training (including TASBO, TACCBO, etc.)** training session.

You selected **"Somewhat useful"**. Please provide more detail on how TRS can improve the usefulness of the resources and information provided to you during the **Conference Training (including TASBO, TACCBO, etc.)** training session.

Which of the following resources have you used during the last year? *(Check all that apply)*

- ☐ Payroll Manual
- ☐ Error Resolution Guide
- ☐ Error and Warning List
- ☐ RE Portal Training Videos
- ☐ File Formatting Guide
- ☐ RE Portal Web Message
- ☐ *Update* Newsletter
- ☐ TRS Emails
- ☐ I haven't used any of these resources

How satisfied were you with the resources you have utilized during the last year?

| | Very unsatisfied | Unsatisfied | Neutral | Satisfied | Very satisfied | Not applicable |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Payroll Manual | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Error Resolution Guide | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Error and Warning List | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| RE Portal Training Videos | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| File Formatting Guide | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| RE Portal Web Message | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>Update</i> Newsletter | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| TRS Emails | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects "Very Unsatisfied" or "Unsatisfied".

You selected **"Very unsatisfied"** with one or more of the resources above. Please provide more detail on your unsatisfactory rating.

You selected **"Unsatisfied"** with one or more of the resources above. Please provide more detail on your unsatisfactory rating.

How helpful did you find the resources you have utilized since your training session?

- ☐ Not helpful
- ☐ Somewhat helpful
- ☐ Helpful
- ☐ Very helpful
- ☐ Extremely helpful
- ☐ Don't know/Not sure

Display this question if the RE selects "Not helpful" or "Somewhat helpful".

You selected **"Not helpful"**. Please provide more detail on why you did not find the resource helpful.

You selected **"Somewhat helpful"**. Please provide more detail on why you did not find the resource helpful.

Display the next question if RE selects "Very helpful", "Helpful" or "Extremely helpful".

You selected **"Helpful"**. Please provide more detail on how the resource was helpful.

You selected **"Very helpful"**. Please provide more detail on how the resource was helpful.

You selected **"Extremely helpful"**. Please provide more detail on how the resource was helpful.

What is your preferred method for receiving training materials?

- ☐ Written online
- ☐ Live online interaction (e.g., Webinar)
- ☐ Recorded videos
- ☐ In-person
- ☐ Other, please specify: _____

Are there any training sessions or materials that are not currently available that you would like to see offered by TRS?

- ☐ Yes
- ☐ No
- ☐ Don't know/Not sure

Display this question if RE selects "Yes".

What training sessions or materials that are not currently available would you like to see offered by TRS? *(Please limit your response to 1500 characters.)*

How would you rate TRS' communications, including toll-free telephone access, call transfers, access to a live person, letters, and electronic mail?

| | Very unsatisfied | Unsatisfied | Neutral | Satisfied | Very satisfied | Not applicable |
|----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Communications | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Toll-free telephone access | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Call transfers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to a live person | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Letters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Electronic mail | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects “Very Unsatisfied” or “Unsatisfied”.

You selected **“Very unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

You selected **“Unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

How would you rate the Reporting Employer Portal on:

| | Very Unsatisfied | Unsatisfied | Neutral | Satisfied | Very Satisfied | Not Applicable |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Site ease of use | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to information, such as resource materials | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects “Very Unsatisfied” or “Unsatisfied”.

You selected **“Very unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

You selected **“Unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

How would you rate the Reporting Employer section of TRS’ Internet site on:

| | Very unsatisfied | Unsatisfied | Neutral | Satisfied | Very satisfied | Not applicable |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Site ease of use | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to information, such as resource materials | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Display this question if the RE selects “Very Unsatisfied” or “Unsatisfied”.

You selected **“Very unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

You selected **“Unsatisfied”** with one or more of the items above. Please provide more detail on your unsatisfactory rating.

Are you aware of the new **Employer Toolkit** to assist your employees with TRS benefit questions?

- ☐ Yes
- ☐ No

Display the next three questions if RE selects "Yes".

How did you learn about the new **Employer Toolkit**?

- ☐ Facebook
- ☐ Twitter
- ☐ Email
- ☐ RE Portal
- ☐ *Update* Newsletter
- ☐ Other, please specify _____

Have you utilized the new **Employer Toolkit** to assist your employees with benefit questions?

- ☐ Yes
- ☐ No

How helpful did you find the **Employer Toolkit**?

- ☐ Not helpful
- ☐ Somewhat helpful
- ☐ Helpful
- ☐ Very helpful
- ☐ Extremely helpful
- ☐ Don't know/Not sure

Display the next question if RE selects "Not helpful" or "Somewhat helpful".

You selected **"Not helpful"**. What about the new **Employer Toolkit** did you not find helpful? Do you have any suggestions for how it could be improved?

You selected **"Somewhat helpful"**. What about the new **Employer Toolkit** did you not find helpful? Do you have any suggestions for how it could be improved?

Display the next question if RE selects "Very helpful", "Helpful" or "Extremely helpful".

You selected **"Helpful"**. What did you find helpful about the **Employer Toolkit**? Do you have any suggestions for how the Employer Toolkit could be improved?

You selected **"Very helpful"**. What did you find helpful about the **Employer Toolkit**? Do you have any suggestions for how the Employer Toolkit could be improved?

You selected **"Extremely helpful"**. What did you find helpful about the **Employer Toolkit**? Do you have any suggestions for how the Employer Toolkit could be improved?

How long have you been in your current position?

- ☐ Less than 1 year
- ☐ 1-2 years
- ☐ More than 2 years

What is the single most important thing TRS can do to improve its relationship with Reporting Employers?

Is there anything else about your organization's work with TRS that you would like to tell us that is not covered elsewhere in this survey?

About Elite Research, LLC

In 2023, Elite Research, LLC celebrates its 20th year globally assisting researchers and practitioners. Since its inception, Elite Research has had the mission of empowering researchers in the nonprofit, academic, and business realms by educating and mentoring clients, providing research and editing expertise, and stepping in at the research point where clients are ready. Elite Research has assisted with thousands of projects ranging from research design, survey development, and data collection to advanced statistical models, data analytics, and dissertation preparation. As evidence of the team members' excellence in empowerment and ensuring project success, many clients return for multiple projects.

To enquire with Elite Research regarding this report, contact Sen Zhu, PhD at info@eliteresearch.com.