



Employer Advisory Group Meeting Agenda & Minutes

Date: 05/22/18
Start Time: 10:30 a.m.
End Time: 12:00 p.m.
Location: E442

Type of meeting: Periodic
Meeting called by: Sue Richards (Provaliant)
Minutes by: Sue Richards
Invitees: Melody Austin, ~~Carol Casey~~, ~~Mark Chi~~, Ashley Conrad, David Cook, Jennifer Dujka, ~~Jan Engler (opt)~~, ~~Chet Henry~~, ~~Anandhi Mani~~, ~~Art Mata~~, ~~Jessica Palvino~~, Barbie Pearson, Michael Ressel, ~~Frances Torres~~, ~~Katie Tucker~~, ~~Kevin Wakley~~, ~~Christine Okanla~~ (ACC)
~~Betty Butler~~ (Dallas County Comm College)
~~Wes Simmons~~ (Dallas County Schools)
Lori Johnson (Eanes ISD)
Dawn Cummings (ESC 3)
Tammy Cunningham (ESC 8)
Jesse Cortinas, Jose Elizondo, Jr. (Judson ISD)
Cathy Felts (Mason ISD)
Nancy Wiggins (Maypearl ISD)
~~Bonnie Barnhill~~ (Midland Academy Charter)
~~Wesley Scott~~, ~~David Rastellini~~, Lori Ganci (Northside ISD)
Tonya Davis (Round Rock ISD)
Jenny Hale, (Schertz-Cibolo-Universal City ISD)
~~Karina Garza~~ (South Texas College)
~~Christine Porter~~ (Spring Branch ISD)
~~Becky Bunte~~ (TASBO)
Diana Salami (Texas State)
~~Aaron LeMay~~, Mary Davis (Univ of No Texas)
~~Greta Graham~~ (Uplift Education)
Pamela McDonald (UT Austin)
Conference Bridge: 877-746-4263
Participant Code: 2219128
Host Code: 2265442

Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG

Expected Outcome: Questions and concerns expressed by members of the EAG will be addressed

AGENDA

- Introductions and roll call

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- Update on action items from April Meeting

- Find out when updated TRS28 will be on the TRS website –

The form is available now.

- Requested enhancements:

These items are being considered with other requests that were collected in RE Training and RE Portal sessions.

1 – Add “Adjusted Report Period” to the screen that’s used to edit and view errors

2 – change warning message 638 so it doesn’t apply to substitutes

- Questions / topics for discussion

1. I am getting errors on every sub, every month, that we employee. My system is creating an ED45 every month for subs instead of an ED40. The ED45 is changing the February dates to March dates for March reporting. My coach indicated that if I am going to create an ED45, I should only change the ending date, NOT the beginning date OR create an ED40 every month. My software company is unaware of this & wants documentation on this, as it is a programming change. (Lori Johnson)

For substitutes, the RE submitted ED40s that covered the entire school year (e.g., 9/1/17-6/1/18) and their software creates ED45s each month (e.g. for April, software generates ED45s with a New Beginning Date of Contract as 4/1/18 and New Ending Date of Contract as 4/30/18 which results in errors. There is no need for the ED45s. Recommendation is to submit ED40 for the full school year using the primary position code that’s applicable.

Skyward came back and said that the ED40 for the full school year can be used. To prevent warnings that appear in months when no salary and hours apply, an ED40 can be submitted for each month in which the substitute works, instead of an ED40 for the full school year..

2. Still too many clicks to get one person cleared. Every time I delete one record, it takes you all the way back to the 1st page. Can it leave you where you were working from on the screen? Is someone on your side able to see what we are seeing? (Lori Johnson)

TRS isn’t able to see what the RE sees however we understand what is happening. This was mentioned in workshops as well. TRS is exploring solutions however it won’t be as easy as it seems like it should be.

3. Jesse from Judson said that they have subs who were substituting from Sept – Dec and then became teachers starting in January. What is needed in regard to ED40 and ED45?

Answer: If employee goes from one position to another, an ED45 needs to be submitted to end the original position and an ED40 needs to be submitted to start the new position. A full work history is needed.

4. Tonya from Round Rock is having the same problem because their software doesn’t create the right ED4x record. TRS suggested having Round Rock’s IT contact reach out.

5. UNT – Will Students need to be reported next year (applies to Higher Ed only)?

Answer: Barbie is pursuing this and is waiting on final confirmation.

6. How will we know if an RE will know if an employee has earned a year of service?

Answer: They’ll need to look back at their records. Or, wait until employee receives their annual statement because information will appear there. If employee contacts RE based on

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information on their annual statement, RE should reach out to TRS so each individual can be researched.

7. *Lori expressed concern that system isn't considering regular RP and RP adjustments for service credit. When data is sent at the beginning of the month, all of the days might not be accounted for and an adjustment needs to be submitted. RE wants to double-check to make sure that employee service credit is correct. If all information has been reported and posted, the reported number of days will be on record.*

When annual statements are produced, TRS will review closely for anomalies and if there's something that seems "off" or is in question TRS will reach out to RE.

8. *Cathy, from Mason, mentioned a problem when logging in. She receives two emails that contain an access code and the code from the second email is the one that works.
Response: The second email is caused when "request code is clicked. There's no need to do that because code is automatically requested when credentials are entered.*
9. *Question: Are response times from Coaches improving? An RE noted an email that was sent that wasn't responded to until a week later.
Answer: Response times are improving and Melody asked her to send an email directly to her with details.*
10. *Has anything been done in regard to adding a new position code for substitutes?
Answer: It was discussed and, at least for now, a decision was made to leave codes as-is. Instead, errors related to Stat Min will become warnings for summer months.*
11. *On thing that impacted Judson is having an employee who isn't TRS-eligible but they're notified that the employee IS TRS-eligible. It's difficult to go back to employee and ask for contributions and in some cases, the employee is no longer working for Judson. If the employee was terminated, TRS understands that the RE is unable to collect contributions.*

Barbie asked for RE input about a change that's being explored in regard to this.

What if rules are changed so contributions are only due from an RE where an employee meets eligibility. They must meet eligibility in any entity they are employed with to report with contributions deducted.

Many EAG members supported the change. A few expressed concern that changing the rule will have negative impact on member.

As a compromise, it was suggested that perhaps contributions should be required from the time that concurrent employment is detected rather than going back. The suggestion will be considered.

12. *Diana from TX State asked how to correct an error that says "reported person has closed account due to retirement"? She sees it when she tries to make an adjustment after the final report month has passed.
Answer: TRS explained that the RE needs to make sure that all information is submitted and correct before the final report month. If that's not done, the member's account will need to be reopened (complex process).*
13. *Jenny from Schertz-Cibolo asked if summer school teachers should be reported with position code 02 on their new contract.
Answer: Yes.*
14. *Cathy from Mason said that the "jump-to" link that lets her get directly to errors is awesome! Barbie noted that TRS is excited about that too. Jennifer mentioned having the member's name on the totals screen is also very helpful.*

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15. Mentioned for discussion at next meeting (email will be sent to TRS). Regarding individuals who are subject to Stat Min whose salary comes from other funding (e.g., Federal), it seems like the RE is paying more than they should. If someone is subject to Stat Min and part of their salary is paid from another fund, there's a document on the RE page under General Information there's a document called [Statutory Minimum/Federal Fund/Non-OASDI Relationship Examples](#) that may be helpful. If additional money is for a separate job/position, it should be reported using a separate ED40.

- Information sharing

- Defects that will be fixed and enhancements that will be released May 24th (evening)
 - Fix to address earlier issues where an RE submits an adjustment record for a previous report period when changing from eligible to non-eligible or vice versa. The position code is the same but the employment type has changed.
 - Resolved the last New Member calculation issue where the system was calculating the New Member period through the 91st day instead of the 90th day.
 - Errors should no longer display for back to back positions of the same position code, due to a partial refund. REs will now be able to report final pay after a partial refund has been issued.
 - A new "EAR Actual Dates Worked" worklist item will be released. The system will automatically send notifications of a worklist item to REs when a retiree is reported by multiple REs in the same report period. REs will need to indicate the actual dates worked in the report period to prevent counting dates more than once.
 - Stat min will be a warning for the summer months (June, July, August) to account for 'Summer School' Positions.
 - Question: Will something be done to fix adjustment reason codes?
Answer: It's being addressed but it was larger than it seems like it should be and isn't ready for tomorrow night's release
- In the pipeline for future release
 - Information not available at time of meeting

- RE Report Status

Report Month	# Completed RP Reports	# Incomplete RP Reports
Sept	1,320 (100%)	0
Oct	1,310 (99%)	10
Nov	1,291 (98%)	29
Dec	1,248 (94%)	73
Jan	1,172 (89%)	149
Feb	1,097 (83%)	225

Report Month	# Completed RP Reports	# Incomplete RP Reports
Mar	1,025 (78%)	297
Apr	910 (69%)	413
May	69 (5%)	1,254

- Pam from UT Austin asked about sizes of institutions that are submitting and wondered if it's the larger entities who have incomplete reports.
Answer: Not necessarily – it's mixed. A few entities are very large (e.g., 16,000 employees, 27,000 employees) are complete through April. Some REs are behind because of issues with their software. Other REs are having trouble due to migrated data.

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- Additional Discussion
 - *All feedback from RE Portal has been consolidated and meetings are in process to review and update enhancement list*
 - *This school year has been a learning process for everyone; going into the next year we shouldn't see many of the same problems*
 - *Termination Certification was discussed at last meeting. Has there been more discussion on allowing someone other than signature authority submit? No, but it's on the list of items that is being discussed.*
 - *Next meeting will be held in June. REs were asked to send dates to Sue that aren't good.*

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date