TEAM PROGRAM
TRS Enterprise Application Modernization

Employer Advisory Group
Meeting Agenda & Minutes

Date: 10/12/18
Start Time: 10:30 a.m.
End Time: 12:00 p.m.
Location: E562

Type of meeting:	Periodic
Meeting called by:	Sue Richards (Provaliant)
Minutes by:	Sue Richards
Invitees:	Melody Austin, ~~Carol Casey~~, Mark Chi, Jennifer Dujka, ~~Art Mata~~, Jessica Palvino, Barbie Pearson, Michael Ressel, ~~Frances Torres,~~ Kevin Wakley, Jennifer Almanza, Lauren Baker, Olivia Bell, Brandi Gardner, Paulino Huerta, Katie Tucker
	Christine Okanla (ACC)
	Claudia Alba (Belton ISD)
	Rebecca Davis (Conroe ISD)
	Betty Butler (Dallas County Comm College)
	~~Wes Simmons~~ (Dallas County Schools)
	Lori Johnson (Eanes ISD)
	Dawn Cummings (ESC 3)
	Tammy Cunningham (ESC 8)
	~~Emily Youngblood~~ (Flour Bluff ISD)
	~~Jesse Cortinas, Jose Elizondo, Jr.~~ (Judson ISD)
	Mickey Smith (Malakoff 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, Jeannie Farahnak (UT Austin)
	Kim Ray (UTMB)
	~~Betty Su Williams~~ (UT Health Science Center at Houston)

Conference Bridge:	877-746-4263
Participant Code:	2219128
Host Code:	2265442

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Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent REs from all over the State and all types of entities. They serve as the collective "voice" of all REs.

Expected Outcome: Questions and concerns expressed by members of the EAG will be addressed. EAG members are expected to share information with other entities in their region and bring questions and concerns from those entities to this group.

AGENDA

- Introductions and roll call

- Questions / topics for discussion

    1. There is still a need for a better way for entities to see what they have reported on a TRS member, instead of downloading ALL CSV files to look for it. I have one district that asks me to mention this every time, as it still a pain point in reporting. (Lori Johnson)
    We're aware of the advantages of having that functionality and will prioritize this with enhancements after resolving issues. It will require significant effort.
    Mark asked if it would help to see the last 4 digits of the SSN in the CSV
        a. *Lori said that it wouldn't help them – it's the number of separate files that's the issue.*
        b. *Betty Su said the last 4 of the SSN would be helpful to them due to the number of matching names. SSN wouldn't help*
        c. *Becky from Conroe asked if error code could be displayed so she'll know if she's looking at a valid or suspended record and, if suspended, the associated error code(s). TRS will add that for consideration.*
        d. *TRS is also looking into displaying information on the screen so it could be more easily copied/pasted however there are a number of security concerns that need to be addressed.*
        e. *Kim from UTMB said that they found it helpful to click on the error tab and then she can right click to select all and paste it into a spreadsheet. The SSN appears and she's able to sort it. The position code doesn't appear in that view. Tonya said that it would help to see the position code.*
        f. *Bottom line, it would help to see error code on the CSV because all other data is there – or perhaps add position code to totals screen, or a hyperlink to the individual record could be added.*

    2. When deleting errors on the TRS website, once I have checked several entries to delete & select the "delete" button, a message will appear at the top that says I haven't selected a record. The only way to delete one at the point is to search for the person & then delete them one at a time. I reported this to my coach a few months ago and just recently again. (Lori Johnson)
    We're aware of the inconvenience, but other issues are being addressed at this time. Consider updating information in your software and submitting a new file, particularly if multiple records need to be deleted. Use search feature and search for SSN and then delete it from the screen when it appears. REs need to be sure to update information in their system to prevent deleted data from being included if file needs to be resubmitted.

- Information sharing

    ▪ Defects that were fixed and enhancements that were released on Sept 30th and/or planned for upcoming release

- o *Released on Sept 30th*
  - • *EAR worklist item for actual dates will no longer be sent for service retirees who retired earlier than Sept 1, 2005. No surcharges will be due and they won't be forfeiting any annuities.*
  - • *RE Coach extension was removed from the RE Homepage. TRS is using a new call routing system and now an RE just needs to enter their 4-digit RE number when calling the 800# in order to be routed to their Coach.*
  - • *A fix was made to error 462 as in some cases, the system was not looking at the correct dates. Going forward, ED40 records should be submitted in July for employees whose contracts start in July, August for employees whose contracts start in August, and September for employees whose contracts start in September. Additional communication will be going out to REs and software providers.*
  - • *The problem with ED90s not posting for ORP refunders was addressed*
- o *Changes to be released on November 4th*
  - • *More thorough ORP validations that will fix most of the issues with processing ORP. It won't be necessary to remove ORP employees from reports any longer.*
  - • *Penalty fees will be charged for late reports that aren't received within the two-month grace period*
  - • *Problems with report history will be corrected. Currently, some of the history isn't displayed.*

- • RE Report Status

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
Apr	*1,323*	*100.00%*	*0*
May	*1,322*	*99.85%*	*2*
Jun	*1,322*	*99.85%*	*2*
Jul	*1,318*	*99.62%*	*5*
Aug	*1,306*	*98.94%*	*14*
Sept	*1,323*	*67.80%*	*425*

- • Additional Discussion

  - o *Lori at Eanes: How many Coaches have been hired to accommodate the conversion and how many will remain with TRS.*
    Answer: Since April, 6 new Coaches have been hired. One was lost but TRS is actively searching for replacement. Goal is to have each coach work with no more than 75 entities. New coaches are currently being trained and training takes 6-8 months. When the new RE Portal went live, 3 Coaches were in training and are now working on their own.

  - o *Becky at Conroe: Regarding worklist for retirees... does RE not need to report those who retired before 2005?*
    Answer: All retirees need to be reported regardless of retirement date or retirement type

(service or disability). Since retirees may work at multiple REs, the sum of their work needs to be considered when determining surcharges. Even though surcharges don't apply to retirees prior to 2005, data is still needed.

o *Becky at Conroe: What's changing about July-August in regard to software?*
Answer: With TRAQS, summer dollars would be accepted even if the MD40 wasn't' submitted until September report. Now, an ED40 needs to be in place in the first month when an employee works, even if the employee isn't paid for that work until a later month.

  o *Kathy (Mason) asked if she needs to submit an ED45 for teachers since they started in August (she submitted ED40 in September). Mark said that it shouldn't be necessary but Jennifer said that an RP25 will be needed to report work that was done in August if it wasn't reported on the August report.*

  o *Tonya urged TRS to make it clear to software providers that employees need to be reported at the start of work, not necessarily at the start of pay (ED40s for new school year)*

o *Mark noted that some entities reported a zero days reason code even though the employee worked. Mark cautioned that the zero days reason code should only be used if an employee doesn't physically work or received paid leave (e.g., leave without pay).*

  o *Tonya from Round Rock: If employees don't work in June and July, should wages be reported with a zero days reason code?*
  Answer: Yes, using a zero days reason code of Accrued Pay for employees who get paid over the summer or code C (on less than 12-month schedule) for employees who get paid over 10 months.

  o *August days are paid per the previous year and included on report. This will be addressed by REs and TRS in a TXEIS User Group meeting on October 23rd*

o *Pam at UT Austin: They like to see how they compare to other entities of their size in regard to report completion*
Mark said that that information isn't readily available but we'll see what we can gather and then share it.

o *Pam at UT Austin: Prior year employer adjustments – if it's a negative adjustment, there's been a lot of work involve in pulling paperwork. Does TRS have any tools available that might make it easier to obtain prior year data?*
Answer: Mark said that there really isn't a lot that TRS can do in regard to this.

Jeannie said that a lot of the adjustments pre-date the Portal and wants to know what to do about those because they're outside their retention period. Many of these are for employees who elected ORP several years ago. TRS is going to discuss this internally – the problem is understood. [ACTION ITEM]

o *Mark said that reporting Summer School employees is being discussed and it's quite possible that a separate position code will be created for Summer School employees.*

o *Tonya asked about a letter from Barbie that their superintendent received. Did it go to everyone?*
Answer: The letter went out to all non-higher Ed institutions. REs who are going to be audited have probably been notified by now.

- o *Becky from Conroe: Is a new position code for Substitutes being considered along with Summer School?*
  Answer: Currently, only Summer School is being addressed

- o *Betty from Dallas Comm College: Could a position code be created for employees who are hired beyond the approved headcount?*
  Answer: Mark said that it's been discussed but, for now, if they need to be reported with a position code of 1-7.

- o *Training for Higher Ed entities is coming up soon and all sessions are full. Will more training for Higher Ed be provided?*
  Answer: TRS is exploring the possibility of doing a webcam so REs can attend remotely but the room where upcoming training will be held doesn't support that. Another session will be held in the Spring and anyone who doesn't attend a Fall session will be given priority. Mark urged REs to get on the waiting list if they want to attend an upcoming session

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date
Action	*Determine if something different can be done in regard to reporting adjustments for employees who they just learned elected ORP years ago or vice versa. As it is now, it's very difficult or even impossible for REs to obtain details that are needed because the timeframe may exceed the record retention period.*	*TRS*	*10/31/18*
Action	*Pull information regarding RE size and RP report completion status*	*Sue*	*10/19/18*