TEAM PROGRAM
TRS Enterprise Application Modernization

Employer Advisory Group
Meeting Agenda & Minutes

Date: 11/12/18
Start Time: 10:00 a.m.
End Time: 11:30 a.m.
Location: E442

Type of meeting:	Periodic
Meeting called by:	Sue Richards (Provaliant)
Minutes by:	Sue Richards
Invitees:	**Melody Austin, Carol Casey, Mark Chi, Jennifer Dujka, Paulino Huerta,** Art Mata, **Olu Onime,** Jessica Palvino, **Barbie Pearson**, **Michael Ressel,** Frances Torres, **Sarah Valenti, Kevin Wakley**
	Christine Okanla (ACC)
	Claudia Alba (Belton ISD)
	Jenny Hale (Comal ISD)
	Rebecca Davis (Conroe ISD)
	Betty Butler (Dallas County Comm College)
	Lori Johnson (Eanes ISD)
	Dawn Cummings (ESC 3)
	Tammy Cunningham (ESC 8)
	Emily Youngblood (Flour Bluff ISD)
	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)
	Karina Garza (South Texas College)
	Christine Porter, **Tara Harris (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, Tiffany (UTMB)
	Betty Su Williams (UT Health Science Center at Houston)

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. 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.

TEAM PROGRAM
TRS Enterprise Application Modernization

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. Provide an update from the TxEIS meeting on 10/23, particularly anything related to concern about information that needs to be reported in August and what's available in TxEIS. New employees and the next year calendar are not part of current year information when creating the RP in August. (Nancy Wiggins)

        a. *TRS presentation mainly covered a couple of general reporting and questions on EAR and creditable compensation*

        b. *Talked about the need to report days and hours worked in a calendar month and pay received in a calendar month*

        c. *It came up in our last meeting but there wasn't time to address at the TxEIS meeting, but issues were caused by trying to upload August employees before TxEIS had the information; TRS recommended speaking with TxEIS representative. TRS will be happy to speak with them if clarification is need.*

            i. *Dawn Cummings talked to Maria Bell very briefly about the concern and will have a follow-up call that includes Jennifer Dujka.*

    2. Future training sessions – Can TRS partner with software providers such as TxEIS or Skyward and jointly hold training sessions? With some issues, we (and others) don't always know if it's a TRS issue or an issue with our own software. (Emily Youngblood)

        a. *Whenever TRS is invited to a conference, we're always happy to attend. At the conferences, TRS is primarily dealing with users rather than individuals from IT. Partnering at TRS training sessions would be difficult because of the number of software providers.*

        b. *As a general rule, any issues prior to uploading (e.g., contents of a file) are likely caused by the RE's software. Errors and warnings seen in the RE Portal may be an issue at TRS and can be researched through the RE Portal.*

        c. *Perhaps TRS and a provider could do a joint presentation. First, we need to capture problems that occur and the associated provider. This was done recently at a Skyward conference where TRS and Skyward addressed questions.*

    3. We are having a difficult time with Employee Information – new member query. We query the portal when employees are hired and set up deductions based on that query. When we upload the RP report, we are told that now the new member status has changed and have to make monetary corrections. (Becky Davis)

        a. *TRS was aware of issues when entities were hiring for the new school year and looked them up in June/July but didn't report them until the school year began. The time difference was a problem because the employee's information may change between the time of the lookup and when they were reported. It's best to look at employee information as close to report submission as possible.*

        b. *Also, though it's not impacting a large population, we're aware of one issue where someone was reported who hadn't been employed in over 5 years and their account*

had gone inactive; new member information was impacted but is being corrected in the next release (early December)

    c. *Jenny Hale asked if a date could be added to the View Employee Information screen (e.g., as of mm/dd/yy or date through which data is valid)*

    d. *Becky of Conroe and Tonya of Round Rock had to correct numerous errors on their September reports because the employee's status changed from New Member to not a new member between the time that information was viewed and reports were submitted. Tonya said that they query at time of hire (early in the month for that month's report). Mark noted that employees who don't appear as a new member when viewed but a new member error occurs on report, they might have received a refund between the time that information was viewed and the report was submitted. TRS isn't able to share information regarding refunds – it's confidential information.*

    e. *Jenny from Comal asked if View Employee Information could be linked to the Refund Certification screen? That hasn't been looked at before but Barbie said that TRS can look into it.*

4. Is there a way to get monthly updates on requests/concerns previously discussed? (Becky Davis) Examples:

    a. Include position column with edit information

    b. New position codes for subs, part time, summer school – *Summer school is being addressed currently an is planned to be in place before Summer 2019. REs and software providers will be notified before it's available.*

    c. Search employee across months and multiple files (ED)

    d. Use ED90 in place of TRS6, TRS7, TRS8 – *this is being addressed in Phase 2, which is currently slated to go live in October 2019*

Monthly updates aren't possible but we'll let everyone know when software changes related to a suggestion made in this meeting are actively being worked. Stabilizing the system has been at the forefront, as well as defect resolution.

5. TRS may update the training videos. What topics will be helpful? Or, is a different method of training suggested?

    a. *Jeanie from UT Austin suggested something searchable would be helpful (e.g. document)*

    b. *Lori at EANES suggested adding Chat functionality in order to get quick answers; TRS would like to move forward with that after working through some of the details*

    c. *Jennifer explained that TRS wants to provide information online that can be accessed at any time and said that topics would be helpful as well as medium.*

    d. *Suggestion was made to provide instructions on fixing common defects*

    e. *Mark asked the group to send ideas to their Coach or to him, if anything comes up after the meeting and mentioned the need to provide information to new entities or new payroll employees at existing entities.*

    f. *Lori talked to Lockhart last week and neither of them feel like they could train anyone successfully yet – it's very complicated.*

    g. *Tara Harris from Spring Branch is working with Christine Porter and trying to learn the system. She said that it's truly a struggle to get a grasp on all of the different types of errors.*

    h. *Betty Su said it would be helpful to split training between Higher Ed institutions and public schools.*

TEAM PROGRAM
TRS Enterprise Application Modernization

  i. *Mark said that a Higher Ed training was held last month at TRS; another Higher Ed session will be held in the spring.*

  j. *A training session is being held tomorrow for personnel who have been doing reporting for less than two years.*

  k. *Q&A from users split out by entity type*

  l. *Spring training sessions that occur in 2019 will be done separately for each entity type*

- Defects that were fixed and upcoming enhancements

  - *Defects fixed in last maintenance cycle*

    - *A lot of validations related to ORP were corrected, however there could still be some issues due to problems with migrated data or account status errors*

    - *Quite a few problems with service credit were corrected*

    - *Report history was missing some statuses – fixed*

    - *Semester date banner was removed until error with that information can be fixed*

  - *Next set of enhancements/fixes will address:*

    - *Issues related to the ED90*

    - *Issues with escheated accounts causing errors when employees with dormant accounts are reported*

    - *Issues where special characters are submitted in an address*

    - *Validation associated with determining concurrent employment*

    - *Accuracy of TRS-Care effective dates*

    - *Regular payroll delete functionality*

    - *Speed of displaying RE Ledger screen*

- RE Report Status – all May, June, and July reports are now complete

Report Month	# Completed RP Reports	% Complete	# Incomplete RP Reports
August	1,318	99.85	2
September	1,228	93.03	92
October	888	67.27	432

- Additional Discussion

  - *UT Austin asked for an update regarding the ability for someone without signature authority to certify terminations*
    Update – it's been logged but hasn't been prioritized yet

  - *Jenny said they were getting questions about timing of last paycheck and when paperwork starts at TRS.*
    Mark said that as long as TRS has all of the forms, TRS will be able to put the retiree on annuity payroll.

- o *Betty Su said that she and other entities have heard about employees calling about statements and asked for an update. Also, she's dealing with a lot of questions that are due to the fact that the payroll date and period ending date aren't the same.*
Barbie said that TRS had 7 employers that did not complete reporting by the time the Statements were run. There is information in the statement that explains what that could be such as employer reports still being processed. TRS is only referring member to their employer if they don't believe the salary on their statement is correct. Regarding the questions caused by the difference between payroll date and period ending date, explanation was provided in an insert that was mailed with the statements.

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date
ACTION	*Check feasibility of linking View Employee Information to the Refund Certification screen; doing so may help improve accuracy of reported information*	*Mark*	