Employer Advisory Group Meeting Agenda & Minutes

Date: 12/11/18
Start Time: 10:00 a.m.
End Time: 11:30 a.m.
Location: E514

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, ~~Tiffani Stanley~~ (UTMB)
✓ Betty Su Williams (UT Health Science Center at Houston)

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

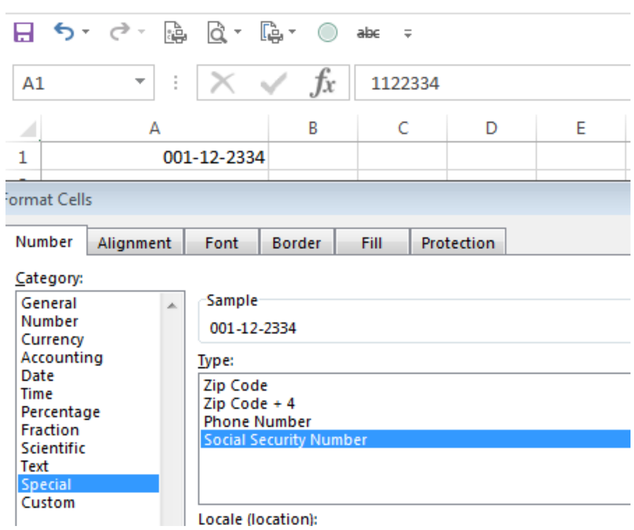
Purpose of Meeting: Respond to questions, address concerns, and share information with members of the EAG. Members of this group represent REs from all over the State and all types of entities. They serve as the collective "voice" of all REs.

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
- TRS Update on action items from last EAG meeting
    - Check feasibility of linking View Employee Information to the Refund Certification screen; doing so may help improve accuracy of reported information.
      Discussed by TRS and we don't believe this would solve the timing issue; Since the validation occurs at a different time than when the RE looks at employee information, there isn't really anything that can be done to make it accurate as of when data will be reported. Becky suggested letting REs upload a spreadsheet of names and having system return information that's now seen on the View Employee Information screen. They'd be able to do that closer to when reports must be submitted. (related to first question from EAG members)
- TRS questions for EAG members
    1. Are you aware of any query results or screens where zeroes need to be added before an SSN in any query results or screen?
       One person said that they don't see leading zeroes when they download errors. Mark said that that's caused by a setting in Excel. Once it's changed, the zeroes should appear.

       To see the zeroes in Excel, make sure that all cells in the column containing SSN are formatted with a Format style of "Special" set to Social Security Number.



    2. Are any new notifications needed in regard to report status?
       Betty Su said that she only receiving the "report is completed" email.

       Christine said that they had an issue where if the web administrator submits a report, they don't receive emails. Other web administrators spoke up and said that they aren't receiving emails either.

       Lori said that she and her web administrator are receiving the emails.

Mark suggested checking the spam folder if emails aren't being received.

One person isn't getting an email when a report is pending a signature. It would be helpful for the submitter to see that in case they need to track down the signer.

Claudia said that she doesn't get emails about rejections. She does get emails about pending status.

Mark asked EAG members to keep track of times when they submit reports this week and provide the information to TRS who'll confirm whether emails were sent.

Christine said that they get some emails but if they try to go into the report as soon as they get the email, they get a message about it being locked for validation.

Mark said that there have been some questions about the "pending complete" status. RE doesn't need to take any action on those – they're for information only. Email message may be changed slightly to make it clear that no action is needed.

- Questions / topics for discussion from EAG members
    - Is there a way to create an eligibility validation process for new hires from a file uploaded into the RE Portal? This would allow districts to query large numbers of new hires at one time and would be particularly beneficial in August/September. Once the employee list with required information is uploaded, the fields from the TRS Employee Information screen would generate a report for the district. (Becky Davis)
      TRS asked for clarification and Becky described uploading a spreadsheet to query a group of employees at once and getting results. Doing it that way could help get information closer to the time when reports must be submitted.
      TRS will revisit this. It was discussed in the past and there wasn't a way to do it then.
    - When a district sends in a name change and another district changes the name, what can be done if the other district's records to not match our district records? (Tonya Davis)
      Be sure that the Social Security card name is being reported. If it is, the other entity needs to use that name as well. If there's a problem, the RE should send a copy of the Social Security card to their coach and they'll contact the other district. The other district may have an old copy of the Social Security card and TRS will work with both entities to help get names in sync per the most recent card. Melody suggested reaching out to the employee and ask them to contact the other entity regarding their name. They should provide the same Social Security card to both entities.

      Claudia asked about an employee who changed their name; it hasn't been changed on MyTRS and the employee was wondering why. Barbie said that MyTRS is still linked to the old system and isn't being updated. It won't be updated until Phase 2 of the modernization efforts is completed. There's a note in red on the website letting the employee know.
    - I was wondering if there is any way a detail could be added to let the RE know when and why a penalty incurred. (Cathy Felts)
      On RE ledger it'll show that penalty interest is associated with a deposit for a particular reporting period and contribution type. Typically, the posted date is shown as well and it can be matched back to the particular report. As far as tying it to a particular record, the system isn't designed to do that. It was considered but there just wasn't a way to do that. It may be reconsidered in the future.

      Betty Su has an example of a payrate change that goes back to Nov 1st. They need to send an adjusted payroll report and it probably be sent with December reports. Could they be *penalized for that because information wasn't reported on time? If this is a retroactive pay increase, the amount isn't eligible for TRS but it should be reported as non-eligible compensation by including it in the Total Gross. No penalties apply to retroactive pay.*

Becky said that they've been penalized a small amount due to errors related to new member. They have a credit balance on a different contribution type and Becky asked if the credit balance could automatically be applied to a bucket where it's needed before it's actually transferred. The system looks at when deposit was made and that date will be used in regard to penalties. TRS will confirm that that's what's actually happening.

- I have recently had 2 separate errors where I was sent 5 steps to fix one and 7 steps to fix the other. Both involving submitting, waiting to post, submitting something again, etc. Both of these had to do with the employee changing positions mid-month. This is:
  1. too cumbersome
  2. time doesn't permit the extra steps for 1 error
  3. this can hold up an entire month of reporting

  What can we do to simplify this? (Lori Johnson)
  TRS needs specific examples in order to address this. Lori said that it happens most often on employees who start as a sub and then move to a permanent position mid-month. Jennifer asked if ED records to change the person from a sub to permanent employer is happening in the same month or in arrears? Lori said that it could be either. If ED changes aren't made before RP is submitted, errors will occur.

  Several EAG members said that they have the same problem; for some it can take days to address adjustments.

  Jesse said it would help them to see what they submitted for each employee. Mark said that it's been noted as a requirement and is being prioritized. Recently, TRS has been working through defects as those are a higher priority. Jesse said that his system shows that an ED45 was submitted but data isn't reflected at TRS. Melody asked Jesse to contact her or Mark if that happens again.

  Jesse asked when penaty fees go into effect. Mark said that they became effective with the September 2018 reports and includes a two month grace period.

  For some, there's an issue with their software that makes it more difficult to report. Jesse is going to be talking to his software vendor.

  Melody asked EAG members if they make the same changes on their system that they make in the Portal. Everyone needs to do that.

  Becky said reporting has been time consuming for them as well. In some cases, they can't make the same change in their software that was required in the Portal. Some of the issues are caused by using the same position code for full-time and part-time subs. If different position codes could be used for part-time sub and full-time sub it would eliminate a lot of their problems. Jennifer pointed out that position code simply identifies the position (substitute) but Employment Type is where full-time and part-time is noted.

  Jennifer encouraged everyone to work with their software provider to address some of the data inconsistencies. If software is creating an ED adjustment in the month when an employee is paid rather than in the month that the change occurred, it could result in an error when the RP report is processed. If the adjustment was submitted when change occurred, some of the problems described today would be eliminated.

Some EAG members pointed out that they can't update their system until they're processing payroll for the prior month. They can't change demographic/position records when the change actually occurred – everything they do is based on timing associated with payroll.

Barbie said that she's aware of the struggle and said that the board is aware of it too. They're also aware of the amount of work required at TRS. Enhancements and defect corrections will continue to be done on a regular basis but unfortunately they can't be done overnight.

- The annual statements were mailed in October, however, some employees would like to see this information online, when will the self-service site be updated? (Claudia Alba)
  Information will be updated when Phase 2 of the modernization effort goes live (currently planned for October 2019). MyTRS will be redesigned and updated as part of that effort.

  Claudia asked how long it takes for employees to get help from the phone center. One of her employees called because they couldn't get the information they need from MyTRS and said that they had to hold an hour and a half.

  Barbie checked and said that the average hold time in November was 7 minutes.

  Mark pointed out that members can request a callback so they can go ahead and hang up. Calls will be made to members in the order received.

- In the future, if an employee wants a summary of the contributions sent to TRS, will this be possible in the future to pull from Teams? We have access to the individual information through the Employee Information, however, we can't get a summary of the current contribution, unless we pulled all reports. (Claudia Alba)
  This is similar to what Melody mentioned earlier. When reporting salary and contributions, all of that data should be in the RE's system to start with. If an adjustment needs to be made in the RE Portal, the same adjustment should have been made in the RE's system.

- Defects that will be fixed in next release and after
  - *Defects fixed in December 16th maintenance cycle*
    - *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 (ED20); some special characters are allowed, but not all*
    - *Validations associated with determining concurrent employment*
    - *Accuracy of TRS-Care effective dates; if someone ends their TRS-Care coverage, the system wasn't looking at effective date associated with that termination*
    - *Regular payroll delete functionality*
    - *Speed of displaying RE Ledger screen*
  - *Next set of enhancements/fixes to be addressed*
    - *Maintenance release 19 will be deployed at the end of January; the following are being addressed*
      1. *Validation corrections and improvements (e.g., one related to new member 485 being thrown incorrectly, one related to overlapping positions, one related to positions reported past the Final Report Month)*

2. *Correction related to 3rd party flag in the Employment/Position screen that's seen by TRS*
3. *Correction related to adjustments associated with previously reported Zero Days Reason Code*
4. *Last 4 digits of SSN will be unmasked in CSV download*
5. *ActiveCare participation information will be corrected (TRS internal)*

- RE Report Status

All August reports were completed since last meeting

Report Month	***# Completed RP Reports***	***% Complete***	***# Incomplete RP Reports***
September	*1,316*	*99.70%*	*4*
October	*1,215*	*92.05%*	*105*
November	*908*	*68.79%*	*412*
December	*9*	*0.68%*	*1,311*

- Additional Discussion

  - *Regarding the reported numbers, how can December reports be completed so early? TRS has the same question; we assume that the entity is reporting information when paid and we frequently remind early reporters that they need to make adjustments on hours if necessary. Most of the time it's the very small entities who report early.*
  - *Jesse said that they've inactivated a lot of contacts and they still appear on contact screen. He asked when they would drop off. Mark said that removing them is on the list but hasn't been as high a priority as other changes.*
  - *Christine at Springbranch asked if address changes are being taken on ED25. No – addressees can be reported on the ED20 but employees need to update their address online or the TRS358 needs to be submitted. Members prior to Sept 2017 who had contributions prior to Sept 2017 can sign up for a MyTRS account if they don't have one.*
  - *It's still necessary to click OK after clicking Return on individual records. EAG member gets a green checkmark and still has to click OK after clicking the Return button. She doesn't understand why she can't just go back. TRS is going to see if this is an easy fix and if so, try to get it done quickly.*
  - *Jeannie said that they accidently clicked and deleted all suspended records and didn't get an "are you sure" confirmation. That's one place where a confirmation is needed.*
  - *Claudia asked what an employee should do if they didn't get their annual statement. Barbie said they should call the contact center.*

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date
ACTION	*Keep track of when reports are submitted and whether notifications are received regarding the report status. If not, let TRS know the date, time, and report type that was submitted.*	*EAG members*	*1/15/19*
ACTION	*See if it's possible to add functionality that will let REs upload a spreadsheet containing names (or other identification) of employees and, in return, receive information provided by the View Employee Information screen for each person on the list.*	*TRS*	*Before next meeting*
ACTION	*Confirm that the deposit date is used when determining penalties.*	*TRS*	*Before next meeting*