Employer Advisory Group Meeting Agenda & Minutes

Date: 3/1/19
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**, Ashley Conrad, Chris Cutler, **Jennifer Dujka**, Nicholas Gonzalez, Art Mata, Bradly Nemec, Jessica Palvino, Barbie Pearson, **Michael Ressel, Frances Torres**, Katie Tucker, Sarah Valenti, **Kevin Wakley**

Karen McDade (A&M)
Jackie Thomas (Amarillo, ISD)
Christine Okanla (ACC)
Laura Klock (Beaumont ISD)
Claudia Alba (Belton ISD)
Theresa Zlotopolski (Clint 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, Theresa Harris (Judson ISD)
Mickey Smith (Malakoff ISD)
Cathy Felts (Mason ISD)
Nancy Wiggins (Maypearl ISD)
Bonnie Barnhill (Midland Academy Charter)
Kathy Rice (Midwestern State University)
RL Richards (Muleshoe ISD)
David Rastellini, Lori Ganci (Northside ISD)
Susie Lackorn (North East ISD)
Lana Walls (Ranger ISD)
Tonya Davis (Round Rock ISD)
Karina Garza (South Texas College)
Tera Harris, 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)
Bete 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
- Input needed from EAG members
  - At the the last meeting, input was requested from EAG members regarding topics below – any additional input?
    - ED90 changes on the termination certification
      - *The change is associated with an employee who transfers from an eligible to an ineligible position during the shool year and then terminates after that. The final report month that needs to be reported is the last month they were eligible (i.e., last month when contributions were submitted).*
      - *Lori said it seems to her that the ED45 would indicate to TRS that the change had occurred. Mark explained that TRS doesn't know when the TRS contributions actually stopped due to different accrued pay timings. Lori understood and supports whatever change needs to be made to ensure that the total contribution amount tracked for the employee is correct.*
      - *The reason for the change was questioned. Mark explained that TRS started going forward with partial refunds and when refund certifications were sent out we discovered that many of the employees were no longer in an eligible position. There was a delay in being able to send out the refund while trying to obtain the final TRS-eligible month. The ED90 needs to be better aligned to the refund certification. If the system still needs a final report month, what's reasonable from a time standpoint – going back a year? Six months? Some software providers have said that they might not be able to have a final report month available when the ED90 needs to be submitted.*
      - *EAG member said that she hoped that they'd get the benefit of having the ED90 replace the certification and perhaps the TRS7. She's never understood why it hasn't changed.*
    - Changes to membership eligibility
      - *Pam said that the ED90 changes will be difficult if it's applicable to prior years due to their system conversion. They didn't see a need from the UT Austin perspective to make any changes for membership eligibility*
      - *Betty from Dallas said that they have a lot of ED20s errors because of work at another agency. She said it would be easier if eligibility could be determined based on data from each of their employers (separately). Mary Davis agreed and noted that it's especially difficult because they don't have visibility of start dates with the other employers. Becky from Conroe said it would be helpful to them as well.*
  - Would it be more efficient for EAG members if we split the group into Higher Ed and non Higher-Ed, with each meeting every other month?
    - *EAG member asked If other Universities be allowed to participate if separate meetings are held? Mark said TRS could consider that.*

        - *Lori said that it seems like the bulk of topics affect all entities and it's fine with her for the meeting to include everyone.*
        - *Mary agreed and said that she learns from others.*
        - *Kim thought it would be easier if Higher Ed was in a separate meeting; Jackie and Karina agreed, especially if meetings are held during critical reporting times*
        - *Cathy asked if everyone could be invited to all of the meetings if separate meetings are held and then attend one or both as desired.*
        - *Mark said that TRS will discuss all of the ideas. If meetings are split, minutes can be made available to everyone and a recap of discussion from the separate meeting can be provided (i.e., recap of Higher Ed meeting can be shared at the non-Higher Ed meeting).*
    - Answers to frequently asked questions can be added to the RE Portal. What questions are you aware of that should be answered?
        - *Mark asked everyone to send questions to reoutreach@trs.texas.gov. It's fine to include scenario-based questions*.

- Questions / topics from EAG members

  From Pam McDonald, UT Austin

  1) Would it be possible for the "View Employee Information Screen" to display:
     a) Dates related to new member contributions? For example, the first/most recent date that the member was considered "new"? We tend to receive lots of errors regarding new member contributions due to the timing of when we view Employee Information versus where we are in our reporting month.
        Planned for future release. Keep in mind that enhancements and defects are prioiritized in relationship to each other, meaning that other items may be implemented before this if they're determined to be a higher priority
     b) If retired, can we display if the person met the 12 month break or not? If I remember correctly, this used to be displayed in TRAQS?
        No; we aren't able to display this. The information doesn't change anything related to reporting the person in the Portal like it did in TRAQS.
  2) It would be helpful to have a "delete record" button while viewing the record, rather than having to click return, search again for the individual, select the individual and then selecting delete. Is there any plans to add this feature?
     Not planned but will be added to list of future enhancements.
  3) We receive errors on ED90s relating to the account already being terminated, when the Termination Certification has completed before the ED90 posts. Can this audit be lifted to remove this error?
     No; The error needs to exist because the system is looking at closed accounts. If it's lifted, there will be unintended consequences. System has to look at both position and employment.
  4) We reconcile our payroll records to our final RE portal history files for audit purposes, in order to document any changes we made between payroll and final report signatures. We have several difficulties in this process.

a) The biggest issue is a common identifier. Since the SSN is masked (which we are good with due to security), we would like to request TRS considering the option of allowing for REs to report an Institutional ID along with SSN. It would be a reference field for institutional use only, and could not be subject to any TRS audits. When we download our history file, we have a common identifier to reconcile these records again. With tens of thousands of payroll records each month, it becomes very cumbersome without a way to compare the two files.
The last 4 digits of the SSN were unmasked in an earlier release. Entities can download the csv and see that portion of the SSN. TRS's Concern with having entities report institutional IDs is that there wouldn't be a way to validate and formatting is likely to differ between entities.

b) We are having difficulty reconciling TRS Care, since the history file does not include this dollar figure. How can we go about obtaining our final records by individual in a secure method? Could we possibly request the file from TRS and have it sent to us via secure portal? For audit purposes, we have no way to prove who we sent TRS care to each month. For historical review/research, we have no way to verify what we final reported to TRS relating to TRS care for a particular month.
This is planned as part of the enhancements associated with View Employee Information; information is planned for a future release.

From Jackie Thomas, Amarillo ISD

5) Will there ever be a time, like on the ED45 screen, when we'll be able to update a retiree's job data information (end/add) all on one screen, instead of going to a previous mnoth and entering a correction before being able to submit current report month job information?
Has been discussed but the data being reported makes it difficult since ER report has both transaction and position information (combines ED and RP data). Jackie said that the problem is with adjustments. Mark said that employment dates can be for the whole school year or on a month by month basis. It's expected that the retiree is working in the same employment type for whatever period is reported. If an employee changes from one empployment type to another, it might be best for ER20s to be submitted on a month by month basis.

6) On the various detailed employee screens, is there a way to include a NEXT button to jump to the next person in the file? Say you're looking at an employee and take no action on them for one reason or another, rather than get out of the screen you could just click NEXT to look at the next employee.
Has been discussed and is planned for future release.

7) Most of our teachers have contracts, that because of "built-in" snow days, go through May 31st. Of course, some other stat min eligible employees have contracts that may extend past that. Hwoever, summer school is slated to start on May 28th.

a) If the summer school contracts overlap the employee's regular contract, will that create issues?
No, it won't create issues at TRS as long as position codes are different.

b) Should the FTE for 09 position code be a 00?
You need to look at the FTE for a summer school teacher. 00 should only be reported if an FTE doesn't exist. If an FTE exists, it should be reported.

c) What would the employment type be for our summer school staff? I'm assuming we couldn't use 02, especially if the contracts overlap, or can we?
If an employee is working summer school, the position code should be 09. The main purpose of that new code is so the system can calculate stat min and OASDI accurately. Jackie asked what the employment type would be if the teacher is only working 4 hours per day / 20 hours per week. For TRS eligibility, employees need to work at least 30 hours. Employment type for someone working 15 hours or more, the employment type should be F. if less than 15 hours, the type should be P.

8) *From Kathy Rice, Midwestern State University:* I have a question about penalties when a retiree only works part-time for our agency (example 5%) and also works for another agency in which they go over hour/days and then both agencies are required to pay surcharges and TRS Care. Are we going to be required to pay penalties on this as well when were not aware of the overage for months and we keep them to the agreed hours at our entity?
No. Mark explained what happens today and said that it's going to be changed in a future release. Existing penalty interest that was charged because of employer contribution adjustments will be wiaved and it won't be charged in the future. Employers can request waivers for interest they were charged incorrectly.
Several EAG members said they submitted waivers and haven't heard anything. Those are being addressed as quickly as possible; Mark said that if waivers were submitted, employers shouldn't pay the associated penalties. TRS is working through those and plans to take care of this programmatically in the future.
Regarding surcharges, laws and rules are strict and if the employee works over the allowed number of hours, surcharges have to be paid equally by their employers.

9) *From Lori Johnson, Eanes ISD:* I know we have touched on this before, but I want to note again that we need to be able to check members/employees days reported since the conversion. I am finding that our software doesn't handle employees with 2 job duties very well. The software company is aware of this and I am aware of how to fix it going forward. However, it doesn't fix what may have been reported incorrectly in the past 1½ years.
This will be possible in the future when transactions can be viewed along with other employee information. Mark asked if Lori's software over or under-reporting the days? She said that it was probably under-reporting. She's concerned that when someone goes to retire, the employee might not have enough days for service credit. Mark suggested compiling a list of employees who were reported with 70-89 days, the Coach or someone else can research.

10) *From Christine Okanla, Austin Community College:* When will a decision be made regarding the Penalty Interest Waiver Requests we submitted? We submitted two Penalty Interest Waiver Requests in Sept. 2018.
After the enhancement that's mentioned in #7 is completed.

11) *From Bete Su Williams, UT Health Science Center at Houston:* New member contributions and how they should be reported based on proportionality for the higher education agencies.
It's Mark's understanding that proportionality doesn't apply to New Member contributions. Bete Su will look into it and be back in touch.

From Mary Davis, Univ of N. Texas

12) Normally TRS does not run processes on Federal holidays. We did receive a message that process would not run on 2/18/19 but fortunately they did. Is there a reason that they cannot

run on a Federal holiday?
At first, processes weren't run on a Federal holiday. We checked with the TRS batch processing team who said that batch jobs are now being run every day, including Federal holidays.

13) Will TRS continue the 2 month grace period in FY 20? If not, what resolutions will be put in place for long processing times, response time from TRS, and the non-visibility of information in TRS to the entities?
Yes; Everything possible is being done now through enhancements and the situation will be re-assessed at the end of the year. What are you experiencing with response and processing times? Mary said that the closer they get to this time of the month, it may take 2 hours rather than ½ hour. It can take up to 6 hours to fix an error. Also, their coach was out and that resulted in further delay even though another coach got involved.

14)
Concern was expressed again about the report due date date because it's so hard to submit reports by the 6th since payroll runs at the end of the month. She asked if it could be changed so money could be submitted by the 6th and reports by the 10th. Lori from Eanes supported that.

15) How are other entities obtaining hours and days worked for their faculty that have returned to work after retirement?
Good question – Mark asked EAG members how they're obtaining the information
   - *Lori said that they have timesheet retirees, sub-system, and less than ½ time retirees who email Lori with days and hours*
   - *Tonya has an automated system within their Finance syste, where retiree logs in and logs their hours*
   - *Becky has all retirees use Kronos sytem*
   - *Some higher eds are based on percentage of time on their job*
   - *Adjuncts don't fill out a timesheet and it's been a struggle to get them to do that. She wants to know if they can just tell TRS that the adjunct is scheduled to teach 3 hours on Tues and Thurs or do they have to get the days/hours from the adjunct?*
   - *Mark said that a conversion factor should be used. In general, Employment measured in semester or course hours or credits, instructional units, or any other unit representing class or instructional time is to be converted to clock hours and counted as a minimum of two clock hours for each clock hour of instruction in the classroom or lab. This reflects instructional time as well as preparation, grading, and other time typically associated with one hour of instruction. If the employer has established a greater amount of preparation time for each hour in the classroom or lab, the employer's standard will be used to determine the number of clock hours scheduled for work.*
   - *Kevin added that if an employer has an alternative measure of tracking, it can be used but TRS needs to be aware of it.*
   - *Regarding days – see if the office hours are a requirement of the class or if they're additional time being spent. If they're additional, they need to be included.*
   - *TRS will go back and try to provide everyone with some examples. Mark asked Mary to reach out to him.*

Defects fixed in latest release and planned for next release

- Defects fixed since the last EAG meeting
  - ✓ *Invalid Report Month error will no longer appear when RP/ER adjustment for a reporting period after Jan 2019 is made using manual entry*
  - ✓ *Correction made to surcharge validations*
  - ✓ *Coach information was updated to reflect staff changes*
- Next set of enhancements/fixes
  - ✓ *Problems with daily and nightly processing were addressed*
  - ✓ *Wording of the concurrent employment notification was corrected*
  - ✓ *Generation of the cash overage/shortage notification was fixed*
  - ✓ *A variety of validations were corrected including EAR surcharges and ORP*
  - ✓ *SSN search box was added to View Report Details screen*
  - ✓ *Hyperlink added to Coach's name on the RE Home page, making it easier to send an email*
  - ✓ *09 Position code for summer school added*

- RE Report Status

Report Month	***# Completed RP Reports***	***% Complete***	***# Incomplete RP Reports***
November	*1,319*	*99.92*	*1*
December	*1,286*	*97.42*	*34*
January	*1,165*	*88.26*	*155*
February	*308*	*23.33*	*1,012*

- Additional Discussion
  - *No additional discussion*

ACTIONS, DECISIONS, ISSUES from the Meeting

Action, Decision, Issue	Description	Assignee	Targeted Completion Date
Action	*Provide scenarios and examples of reporting adjunct days/hours using information from this meeting and information to be provided by Mary Davis*	*Mark Chi*	*Next meeting*